The Role of Branding within an integrated supply chain:
A case study for Naturally Coloured Wool

Mary Carberry

A thesis submitted in fulfilment of the requirements of
De Montfort University for the degree of Doctor of Philosophy

November 2000

De Montfort University
Leicester Business School

Abstract

At the start of the new millennium, there is an increase in collaborative marketing. The wool textile supply chain provides an opportunity to investigate a rich combination of interconnections and interrelationships between both horizontal and vertical organisations. There is also, at another level further interaction evident, that is between natural and manmade fibres in the minds of those in the supply chain and consumers. For a product, such as naturally coloured wool, whose fundamental form is changed as it travels through the supply chain, it is even more vitally important that it possesses a strong brand identity if it is to successfully compete against other fibres.

This research explores holistically the causal relationships between supply chain interfaces, to ascertain whether a collaborative approach to the development of a brand identity for British naturally coloured wool is possible.

One element of brand identity, image, was chosen to investigate the attitudes and perceptions across the supply chain to a product that can rarely be found in fashion clothing retail outlets for general public purchase. Through an industry and consumer survey throughout the U.K. disparities in brand image perceptions have been identified.

These images and perceptions have been used to develop and apply a framework to assist in the creation of a brand image marketing strategy, as an aid to developing a competitive advantage through the application of collaborative supply chain marketing.

Acknowledgements

I would like to thank all those who have helped me in so many ways towards the completion of this thesis. I would especially like to thank Professor Peter Baron, my Director of Studies for his guidance, support and expertise. Additionally, I would like to thank Dr. Clive Harrison, my supervisor, for his advice and enthusiasm for the research.

I must also thank my husband, Kevin Armstrong, for his patience, understanding and unfailing support throughout my studies.

Finally, I would like to remember my friend and inspiration for research, Dr. Cuthbert George.

CHAPTER ONE

1.0 INTRODUCTION

Within the fashion, clothing market there is increasing competition. In the highly competitive fashion clothing market, there are a number of players who utilise the fabric from which their clothing is produced i.e. Teflon, Fabric Protector to provide a competitive advantage. Currently, naturally coloured wool is a relatively limited commodity used in clothing, which could benefit from adopting such a strategy. To create a competitive advantage for naturally coloured wool and to increase its usage, it is necessary to firstly understand the attitudes and perceptions of this product throughout the textile supply chain. The study is motivated by a desire to extend the knowledge of brand imaging theory by analysing how a product may keep it's identity as it proceeds through the value chain from producer to consumer.

To fully appreciate the issues involved, it is important to understand the current role of branding within this case study context. It is widely reported that the application of branding as a marketing strategy in the 1990's is dramatically changing (King, 1991), even to the extent that 'it's been clear for many years that nowadays successful new single line brands are a great rarity' (Madell, 1980). Many successful FMC goods are facing strong competition from both distributor's and generic brands. At the same time horizontal marketing associations, such as, agricultural marketing co-operatives are facing difficulties in successfully competing with non-agricultural, manufacturing and distribution organisations (Le Vay, 1985). The preposition suggested by Doyle (1989) is that branding in the 90's is dependent on the creation and sustainability of a powerful brand concept within any sector of business life. Nilson (1998), further

hypothesises 'that it is not enough to have a competitive advantage, you have to be seen as having the advantage.... The brand's role is to identify the product ... to trigger a set of stored values in the minds of the customer'.

It should be noted that the concept of a product is not straightforward and products/brands are often mistakenly only associated with FMCG's (Doyle, 1989). When considering the fundamental elements of a product there are at least two perspectives: from the sellers point of view a product could be an item produced in a factory or office, whereas the customer views the product as a means of providing solutions and meeting needs. The discrepancy between these viewpoints is exacerbated when a 'products' supply chain involves many stages in buyer and seller relationships before finally reaching the end consumer. It is, therefore, paramount that a consistent series of marketing strategies is developed so that a coherent product image is provided for each purchaser. This is particularly pertinent, in the light of the importance currently being placed on the process of brand building within the business to business sector (Nilson, 1998), an area traditionally dominated by FMCG's. It is commonly believed that the final purchaser/consumer are those who are most concerned about the brands they purchase. However, Nilson (1998) suggests that it is in fact the respective professional buyers who must be seen to make the right purchasing decisions. As a result, they tend to select a strong brand name as they believe it carries less 'risk' (Assael, 1998). This would, therefore, suggest that for a product such as naturally coloured wool to be successfully marketed throughout the supply chain, it must be a recognisable brand.

In an attempt to resolve this debate, this research investigates the concept of branding within a complete supply chain. The primary aim of this research is to extend current knowledge within branding theory. To this end, the scope of this research was limited to a single system. The 'wool' textile supplychain was chosen because a large myriad of organisational types, marketing relationships and unique product brands proliferate within the system. The breadth and depth of the system would, therefore, allow a detailed understanding of the similarities and differences relating to naturally coloured wool to be identified and a model of dispositions to branding constructed. From this research it is intended to develop a brand imaging model which will not only demonstrate how the brand perception relationships interact within this supplychain but also assist in identifying how a product may keep it's identity as it is processed through a supply chain.

Also, at various relevant stages throughout the research linkages will be discussed between the development and final selection of branding strategies for naturally coloured wool. To aid in the brand strategy development the empirical work will investigate the current brand perceptions to identify if these require alteration, the results of which will be discussed in the conclusion chapter.

1.1 THE LITERATURE GAP

The initial literature review revealed that over the past 90 years a wealth of research work has been undertaken within the production of wool (Adalsteinsson, 1979: Ryder, 1983), co-operatives and their role (Sargent, 1994; Le Vay, 1985); wool processing technologies, relationship marketing and the strategic role and application of marketing and branding (De Chernatory, 1998; Doyle, 1989). However, despite the breadth of this research, a more detailed appraisal of the literature review also revealed that this topic has been treated in a fragmented way. Specifically, there are deficiencies in the study of relationships within the 'structure' of the industry and how concepts of branding are utilised between them. This knowledge gap was especially evident in relation to the understanding of how branding was utilised within a whole supplychain system. In addition, there also appeared to be a lack of any detailed understanding of how each agent in the system 'related' to all the others in the supply chain.

Thus, whilst the research already undertaken has extended the body of knowledge in this area, it is believed that further research is required to develop a more robust and coherent set of theoretical constructs for the application of brand imaging throughout the supplychain.

1.2 THE RESEARCH PROCESS

The term research process refers to the systematic, focused and orderly collection of data for the purpose of obtaining information from it, to solve/answer our research problems or questions (Ghauri et al, 1995). The research process adopted for this study as illustrated in Figure 1.1, follows a classical linear research process approach. It should be noted that whilst the linearity in this model appears simplistic, in reality the research process is cyclical, and has several simultaneous stages. The research process will consist of eight elements, which will be conducted in three phases, arranged as follows.

Phase 1 will involve the application of research elements 1 to 3 (observation, problem definition and theoretical underpinnings). This consists of a review of the relevant literature to the case study. Figure 1.2 highlights the academic disciplines consulted for the key foci of the research. Following on from this, Chapter 2 will provide an overview of how and why the textile system has developed to its current state drawing out the key forces that impinge on the textile industry today. The role of agricultural marketing and its influence within marketing co-operatives will then be introduced in Chapter 3, while chapter 4 will discuss branding and supplychain theory relevant to the product under investigation. Chapter 5 will introduce the methodological stance applied within the research.

FIGURE 1.1 THE RESEARCH PROCESS

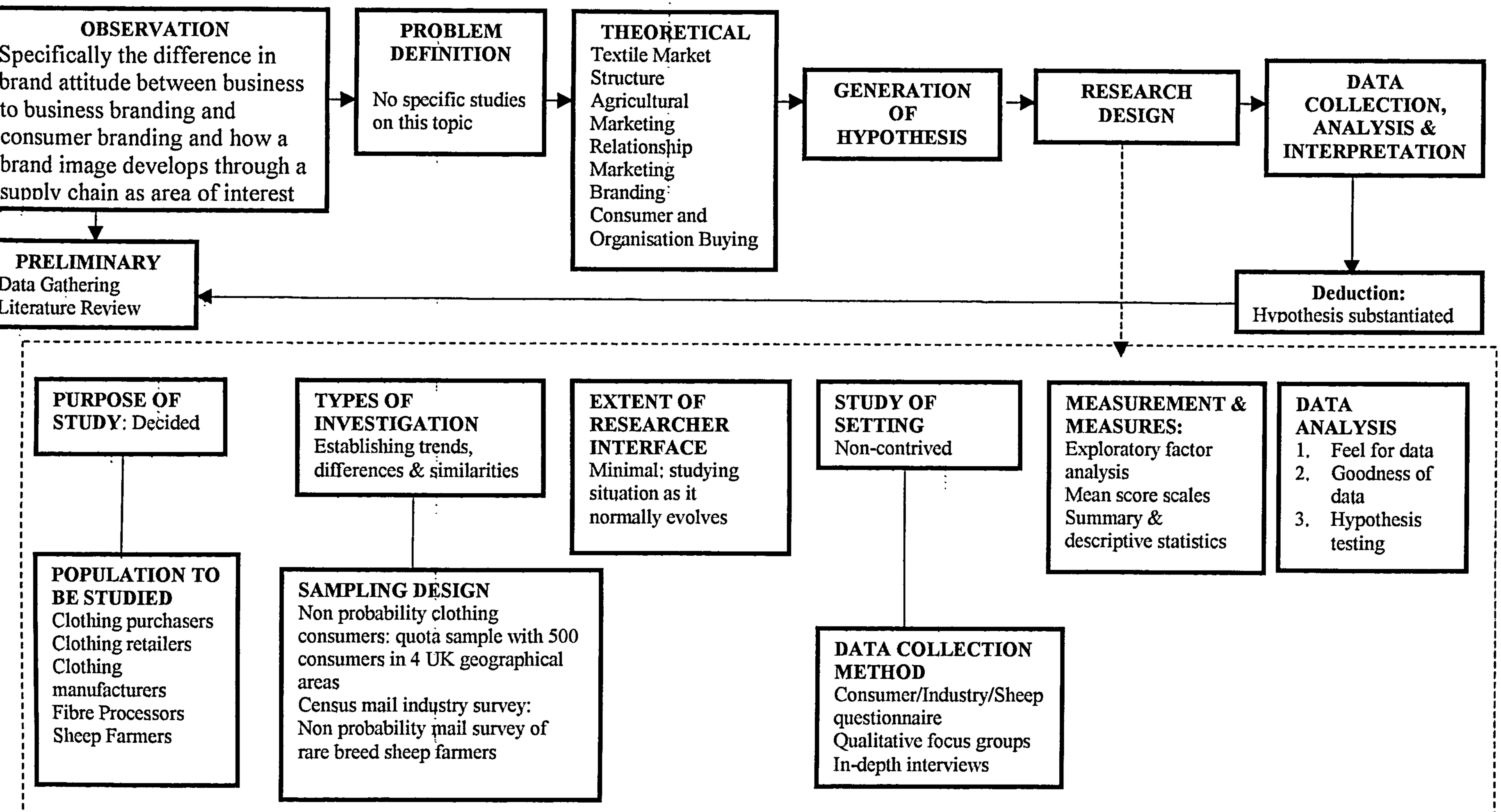


FIGURE 1.2 ACADEMIC FOCI OF THE RESEARCH

Primary focus of Research /Academic discipline	Primary Producers	Manufacturing Theory	Distribution / Logistics Theory	Retail Theory	Consumer Purchasing
Agricultural Marketing	✔		✔		
Agricultural Economics	✔	✔			
History	✔				✔
Psychology				✔	✔
Sociology	✔				✔
Statistical Mathematics	✔	✔	✔		✔
Marketing	✔	✔	✔	✔	✔
Branding	✔	✔	✔	✔	✔
Biology	✔				

Phase 2 will involve the application of the literature review analysis to the exploratory study of the supply chain to provide insight into the problem definition and enable the conception of a theoretical framework and hypotheses.

Phase 3 the final stage of the research will involve creating a research design, undertaking data collection and analysis and deducing from these findings whether the hypotheses were substantiated. Figure 1.3 identifies the empirical research undertaken during the nine-stage process of this research.

FIGURE 1.3 NINE-STAGE RESEARCH PROCESS FOR THIS STUDY

Stage of Research	Type of Information Collected	Research Method Applied	Sample
1		Literature Review	See Figure 1.2 for details
2	Exploratory Qualitative Data Collection	In-depth Interviews	Shetland Islands: - Wool broker Wool mill owner Co-operative Production Group Shetland Island Wool Agency Shetland Island Agency UK: - British Wool Marketing Board Carpet Marketing Manager Wool Marketing Manager Shetland Sheep Breed Society Board Members Rare Breed Society Hand Spinner/Own Business Sheep Farmer Fabric Factor Agent Furnishings Manufacturer (Warner Fabrics) France French Wool Co-operative Worker
3		Analysis of in-depth interviews and formulation of hypothesis	
4	Quantitative Data Collection	Mail Wool Industry Survey	Census of organisations involved in wool purchase and production within the UK
5		Analysis of survey	
6	Qualitative Data Collection	Focus Groups	Representative samples of the final survey population Spinners Weavers General Public 18 – 29 year olds 30 – 60+ year olds
7		Analysis of Focus group material	
8	Qualitative & Quantitative Data Collection	Supplychain Survey	Sheep farmers Wool Industry Clothing Manufacturers Retail Outlets End Users
9		Analysis of survey details	

1.3 THE RESEARCH PHILOSOPHY

Today, the researcher encounters a bewildering array of constructs, theories and paradigms through which they have to conduct their own research. It is believed by academics that it is fundamental to understand the perspective that underpins your 'world view' as this defines your parameters and informs your judgement. As a result, in order for the academic to obtain a deep understanding of their research they must at least acknowledge their 'preconceptions and bias' (Easterby et al, 1991).

Since the early schools of marketing thought, a conceptual base has evolved which has embraced the practice of marketing theorists borrowing from other disciplines (Sheth et al, 1988). Indeed, the key factors in marketing are essentially socially constructed: human beliefs, behaviours, perceptions and values. Hence, it is important to employ research methods drawn from this perspective, such as observation and qualitative interviews. This research, therefore, rejects a purely positivist approach and will apply both qualitative and quantitative data collection techniques in order to acquire a deeper understanding of the research area.

This research will be based on the interactive/non-economics perspective of systems in marketing, which is an accepted construct/ phenomena/ theory. This will be applied to the case study relationships, to identify if these interactions conform to the generality of systems theory in marketing construct or whether it needs to be partially of wholly refined. The outcomes of the research may result in a major revision of this construct in the light of a more detailed investigation into a previously 'unresearched' area. The argument therefore, is a relativist stance and there is an acceptance that there is no construct that will completely cover all circumstances.

Considering the nature of the research it is believed that the systems methodological approach offers the best framework. This methodology lends itself to the study of relationships with a complex supplychain and to the exploration of how individual image/attitudes affect the creation and sustainability of brands (Harrington et al, 1999; Rechlin et al, 1997). The inherently subjective 'soft' nature of this research will also have considerable impact upon the design of the main data collection instrument. Consequently, the collection instrument will have to be designed to cope with mainly qualitative data. At the same time, however, it will also have to offer a framework that will support the collection of hard data necessary to allow for the testing of the research hypothesis.

1.4 CHAPTER SUMMARY

The wool fashion clothing textile supply chain provides a rich combination of interconnections and interrelationships, which ultimately provides clothing for consumers. This research investigates the current use of brand concepts for British naturally coloured wool to enable strategies to be developed to create a competitive advantage for this product.

In order to achieve this, this research explores holistically the causal relationships between supply chain interfaces to ascertain whether a collaborative approach to the development of a brand identity for British naturally coloured wool is possible. To achieve this data will be obtained from consumers and supply chain members to identify their current attitudes and perceptions of British Naturally Coloured Wool. With this knowledge it will then be possible to identify if there is a need to alter these perceptions through brand strategies for the naturally coloured wool market.

The key areas of investigation have been placed into a framework which will structure the research and enable an overview of the research domain as a whole. The following chapters review the literature, consider the appropriate methodology to collect the empirical data so that a range of brand strategies can be developed for British naturally coloured wool.

1.5 REFERENCES

Adalsteinsson, S., (1979), The Coloured Wool and Sheep Industries In Iceland – Production, Use and Marketing. In *Breeding Coloured Sheep and Using Coloured Wool*, Peacock, South Australia.

Assael, H., (1998), *Consumer Behaviour & Marketing Action*, 6th ed., South Western College Publications, Cincinnatiohi.

De Chernatory, L.; McDonald, M., (1998), *Creating Powerful Brands*, 2nd ed., Butterworth/Heinemann, Oxford.

Doyle, P., (1989), Building Successful Brands the Strategic Options, *Journal of Marketing Management*, vol5, pp 77 – 95.

Easterby-Smith, M.; Thorpe, R.; Lowe, A., (1991), *Management Research, An Introduction*, Sage Publications Ltd, Bristol.

Ghauri, P.; Grohaig, K.; Kristianslund, I., (1995), *Research Methods in Business Studies: A Practical Guide*, Prentice Hall.

Harrington, H.J.; Car, J.J.; Reid, R.P., (1999), What's this 'systems' stuff, anyhow?, *The TQM Magazine*, Vol. 11, No. 1, pp 54 – 57.

King, S., (1991), Brand Building in the 1990's, *Journal of Marketing Management*, Vol. 9, 1, pp 3 – 13.

Le Vay, (1985), Agricultural Co-operative Theory: A review, *Journal of Agricultural Economics*, 7th Review Series.

Madell, J. (1980), New Products: How to succeed when the odds are against you, *Marketing Week*, February 22

Nilson, T. H., (1998), *Competitive Branding: Winning in the Market Place with Value-Added Brands*, John Wiley & Sons, Chichester.

Rechlin, E.; Maier, M.W., (1997), *The Art of Systems Architecting*, CRC Press, Boca Raton, FL.

Ryder, M., (1983), *Sheep and Man*, Duckworth.

Sargent, M. J., (1994), The chequered career of UK agricultural co-operation: a continuing story?, *Yearbook of Co-operative Enterprise*, Plunkett Foundation, Oxford.

Sheth, J. N.; Gardner, D. M.; Garrett, D. E., (1988), *Marketing Theory: Evolution and Evaluation*, John Wiley & Sons, Canada.

CHAPTER TWO

2.0 INTRODUCTION

This research is concerned with the current and future prospects for naturally coloured wool. However, in order to understand the dynamics of today's wool textile supply chain it is necessary to briefly look at the historical context of today's global wool market. The historical review will shed light, therefore, not only on the facts that shape the current global and national market structure but also on the current perceptions and attitudes of the main players whose actions will help decide the future development of the market. Only when these dimensions are understood can marketing strategies be developed that will overcome these challenges.

2.1 DISCUSSION OF THE WOOL MARKET AND IT'S HISTORICAL CONTEXT

The results of the literature search into the development of wool in the UK have been synthesised into an illustrative timeline, which can be seen in Figure 2.1. The literature search has revealed that wool has been playing a unique role in human's history since primitive times, not only as a clothing fibre but also in the prosperity of many countries economies. Since domestication (circa 9000 BC), man has found many uses for sheep - milk, meat, fleece/wool, lanolin (a valuable by-product used for the basis of many chemicals), skins as well as being sold as breed stock.

FIGURE 2.1 TIME LINE OF BRITISH WOOL HISTORY

17th Century BC	First known white wool identified in Tell el-Amana in Egypt (Ryder, 1983).
3,500 BC	Neolithic Stone Age People, bring first sheep to Britain and wear sheepskins (Hald, 1980).
2,000 BC	Bronze Age People, weave with brown coloured fleece, similar to Soay wool (Ryder, 1983).
1,000 BC	Iron Age, white wool becomes common in cloth (Ryder, 1989).
AD 54	Roman Age, bring their well-organised textile industry, to Britain (Ryder, 1965). Also they bring their own type of sheep
	Anglo-Saxon Age, no significant wool contribution. During this time interbreeding of native and Roman sheep (Clutton-Brock, 1976).
10th Century	Viking Age, bring with them the last influx of new sheep. A breed that has black faces spiralled horns
1066	Norman Age, no significant wool contribution. Sheep continued to interbreed (Ryder, 1981).
12th Century	Production of fine wool as a result of starvation of sheep, sold to Flanders and Italy. Taxes levied on wool export (Postan, 1972).
1320	Flemish weaving industry collapses due to high priced raw materials. The industry moves to Britain, supported by Edward II. Main wool export market lost (Ryder, 1981).
1700's	Development of first genetic development for sheep. Resulted in larger meat animal.
1791	Merino flock sent from Spain
1811	British Merino Society formed (Carter, 1964).
18th & 19th Century	Growing increase in the demand for meat (Lawton, 1978). Merino flock disbanded
19th Century	View that you could not have high quality meat and wool of the same sheep. Purchasing of Australian Merino begins.
1931	Created of the Agriculture Act, to provide a guaranteed price scheme. Did not include wool.
World War II	Creation of the Wool Control, who bought and sold the entire British clip.
1950	Creation of the British Wool Marketing Board, whose main aim is to guarantee a minimum price for wool to the producer.
1970's	Renewed interest in coloured wool (Adalsteinsson, 1994)
1974	Creation of the British Combined Flock Book (Alderson, 1989).

Analysis of the information, covered by the timeline, has identified several major themes in the development of wool.

- **HISTORICAL IMPLICATIONS FOR ECONOMIC FACTORS RELATING TO WOOL**

Archaeological evidence proves that the manufacture of cloth and clothing has been undertaken in Britain since the Bronze Age. However, it was only in the twelfth century that British wool became a major contributor to the national wealth. Around this time the fine wools of English sheep were highly valued abroad, especially by the weaving centres of Flanders and Italy (Postan, 1972). Capitalising on this readily, available market wool exports soon represented Britain's major revenue-earning commodity. However, when the Flemish weaving industry collapsed in the fourteenth century Britain lost her market for fine wool. By the fifteenth century, wool prices were severely reduced, leading to a low level of investment and consolidation. As a result of the lack of organised wool producing industry, in the 18^{th} and 19^{th} centuries, British wool suppliers were unable to meet the demands of the developing textile industry (Ryder, 1981). The result was that this demand had to be met with wool imported from the continent. Thus, today, although Britain only exports 3% (IWS, 1997) of the total global production of raw wool, it still imports 39% (IWS, 1997) of Western Europe's annual raw wool to meet the current demands of the British textile industry. Overall, therefore, British wool production currently can be characterised as being fragmented and of relatively minor significance to the British economy.

- **HISTORICAL IMPLICATIONS FOR SHEEP MEAT & WOOL**

Crucial to the development of wool has been its relationship with the other main use of sheep, namely as a provider of meat. The breeding of sheep for meat production began to take precedence over wool production in the 18th and 19th centuries triggered by the rapid growth in the British urban population (Lawton, 1978). The demise of sheep production for wool, was greatly accelerated by the mistaken belief that sheep could only be bred for either meat or wool, but not both (Carter, 1964). Indeed it is a testament to the strength of this belief is that it is still prevalent today. In the early 1800s, the Merino Society imported from Spain merino sheep (a sheep that yielded finer wool in denser, heavier fleeces). They challenged the established view by attempting to prove that with the merino sheep the production of wool could be seen as a viable alternative or supplement to meat production. In the end, however, the merino venture collapsed in the face of a powerful meat lobby, cheaper imports from Saxony and the developing Australian market. With the failure of the merino venture, sheep breeding in Britain was to remain entirely directed to the production of meat. In the modern era, this has been reinforced by EC subsidies, which have been provided for meat and by the fact that wool is not even classified as an agricultural product. As such, wool is therefore not eligible for subsidy or part of the support network that other farm produce continues to enjoy. In consequence today, wool production is perceived by many farmers as a tertiary activity and has thus not received the same attention in terms of resources or research that meat production has enjoyed.

- **HISTORICAL IMPLICATIONS FOR WOOL QUALITY & BREEDING TECHNIQUES**

Until the 18th Century the major contributions to the improvement in the quality of British wool owed far more to the breeds of sheep and technical ability brought by invaders than to the skill of the native breeders. For example, it was the Romans who first introduced a well-organised textile industry to Britain. Furthermore, it is also known that it was the Romans who, developed selective breeding techniques that could have led to the production of fine wools (Ryder, 1965). Unfortunately, the evidence indicates that the only legacy the Romans left was their sheep, which along with the Soay type strains have evolved into many of the sheep breeds known today such as Welsh Mountain and Cheviot. Selective breeding techniques were not continued by Anglo-Saxon farmers, (Clutton-Brock, 1976), and so the animals continued to adapt 'naturally' to their varying environments. Nonetheless, by the time the Normans invaded Britain in 1066, the main strains of sheep were present. The genetic material from the Soay-type, Roman-type and Viking-type sheep provided the potential for the evolution and development of a very wide variety of British breeds.

The quality of British wool was left unchecked by the primitive ideas and techniques that sheep breeders employed until the 18th century. For example, it was long believed that fine wool was mainly achieved through starvation of the animals. This was exacerbated by the extra demands placed upon the land with the introduction of the crop strip rotation by the Anglo-Saxons. It was only in the 18th Century that more sophisticated breeding techniques were introduced to animal breeding. This was largely the result of the work of Robert Bakewell, 1725-1975, son of a Leicestershire farmer. In genetic terms, Bakewell

was reducing the genotypes of the stock from which he was selecting his breeding animals to a fairly narrow range. Using Bakewell and other breeders as examples, farmers quickly followed suit producing other pedigree breeds. It was during this period that farmers' meetings to discuss and compare their animals became common. However, because the farmers, who were driving these advances, including Bakewell himself, were passionately convinced of the supreme importance of meat products in the production of livestock, the genetics of fleece characteristics were largely ignored. Indeed, it has only been in recent times, that sustained yet limited research has been undertaken in the field of fleece colour and genetics (Ryder, 1994, Addalsson, 1994, Vandeleur, 1993, Kirby et al, 1989). With such a limited interest in this area, there is relatively little scope for improvements in quality. However, today quality is largely in the hands of the 'hobby' naturally coloured wool farmers, whom take great pride in their product. Many of these farmers are highly educated and seek out current research in this area. With the result that many of these flocks contain very good examples of quality wool characteristics for that specific breed.

- **HISTORICAL IMPLICATIONS OF THE COLOUR OF WOOL**

Today, white wool is the dominant type of fleece in use for the production of yarn. The white fleece enables the manufacturer to take the fullest use of the property of wool to accept dyes. It is believed that the ancient Egyptians knew this property as archaeologists have discovered white wool in the temple stores of Pharaoh Akhebaten, dating back to 17th century BC. (Ryder, 1983). In Britain, the early types of sheep have

been found to be of a brown colour similar to that of the Soay sheep. Indeed, it was only about 1000 BC, that white wool did become common, until then it was grey coloured wool that was the most prevalent being produced (Ryder, 1994). Once the ability of grey and then the white fleeces to take dye became more widely practised, it was inevitable that naturally coloured wool would be forced into a smaller supporting role. Though national statistics for sheep numbers, do not differentiate between white and naturally coloured, it is likely that today, naturally coloured sheep only account for less than 1% of total UK flocks. Ironically, the survival of British naturally coloured wool may be due to the fact that naturally coloured flocks are managed mainly by 'hobby' farmers, rather than those of commercial farmers who rely on the dyeing properties of white fleece to make a living.

- **BRITISH COLOURED WOOL INDUSTRY**

From the preceding discussion the challenge faced by naturally coloured wool today is quite clear. It is a tiny niche of a minor economic sector, unfashionable compared to meat production. Even within the wool arena, it is seen as possessing little potential compared to the more flexible and marketed white wool. Nevertheless, in recent times, naturally coloured wool has started to carve out for itself a more meaningful and lucrative niche in the UK wool market. Indeed, farmers throughout the world still produce naturally coloured wool and especially since 1970's there have been growing quantities of this type of wool produced in Australia and New Zealand (Adalsteinsson 1994). The spur for this development was a revival of interest in coloured wool throughout the world. Adalsteinsson (1994), believes that the reasons for this renewed interest are two fold: -

'partly the beauty of the natural colours, but, also a 'wanting' to go back to primitive life - back to nature'. As a result 'a real market for this type of fabric opened up during the 70's' (Adalsteinsson, 94). In Britain, this was directly hampered by the fact that the many primitive and hill breeds did not possess a Breed Society. In an effort to counteract this deficiency a registration programme was established in 1974 with the publication of the Combined Flock Book by Rosenberg and Alderson through Countrywide Livestock Ltd (Alderson, 1989). Furthermore, in the late 1990's several of these Breed Societies embarked on marketing schemes. These coloured sheep entrepreneurs base their businesses on marketing the appeal of their chosen breed or breeds, aided by the selective rare breeds exemption from the British Wool Marketing Board or by buying the wool used for their products from the British Wool Marketing Board (Woodhead, 1994). Thus, although the environment in which naturally coloured wool operates is very hostile and in many ways unpromising perhaps through innovative approaches and by repositioning the image of naturally coloured wool, a stronger future may be secured.

So far, this chapter has reviewed the historical development of sheep use and how this has been affected by economic, political and social factors. The following section will examine more closely the physical attributes and characteristics of wool. It will be shown how these characteristics have had a fundamental impact upon the current use and perceptions of wool.

2.2 GENERAL WOOL CHARACTERISTICS

To the general public fleece is seen as a homogenous part of the sheep. In reality, however, there are in fact three types of wool fibre to be found in fleece - these are **kemp**, **hair** and **true wool** (See Appendix A). These fibres are grown from two types of skin follicle - primary and secondary. They occur in varying proportions according to the strain or breed of sheep and can be used to identify not only the types of sheep from which raw wool samples are derived, but also their level of evolution. Each type of wool fibre possesses characteristics by which it can readily be identified in fleeces, yarns or fabric samples (Ryder, 1994).

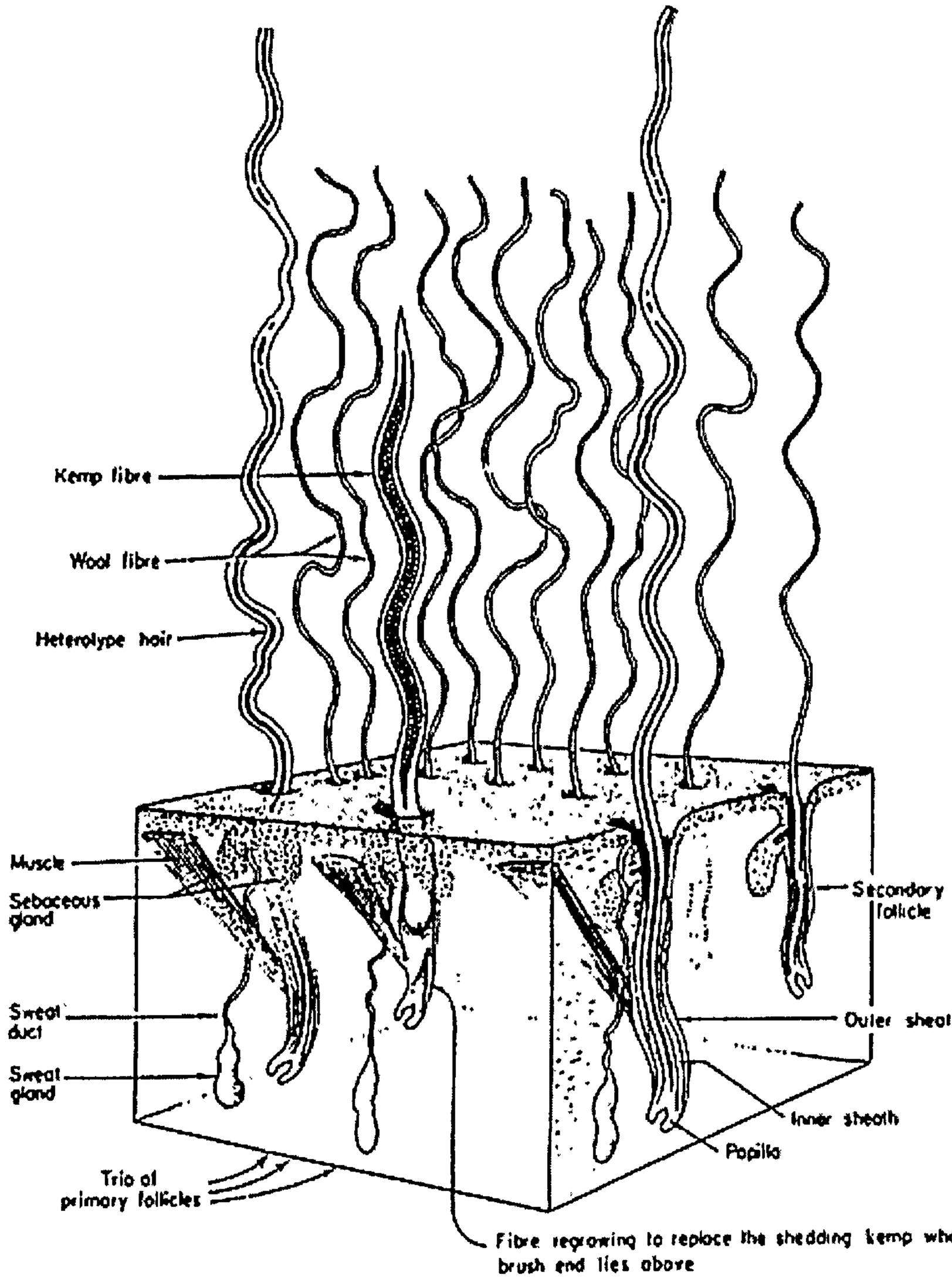


FIGURE 2.2 ILLUSTRATION OF WOOL FIBRE COMPOSITION
(Source: Ryder, 1994)

In response to the needs of manufacturers for a more consistent fibre, research has been carried out to find ways that will reduce the variability in fleece. For example, it has been discovered that improved husbandry by reducing environmental variation often

leads to an immediate positive response in fleece quality (Ryder, 1994). This is supported by Kirby et al (1989) who stated that dynamic changes in environmental conditions have been found to have an overwhelming influence on changes to the wool staple, in particular tensile strength and in terms of total yield (Nolan 1986, Bottomley 1979). Research is still being undertaken both through academic and government sponsored establishments in order to provide farmers with knowledge to improve their wool. This is still mainly to do with white wool but naturally coloured wool can benefit as well from the research.

- **COLOUR WITHIN WOOL**

The production of kemp, hair and fine wool fibre is determined largely by the genotype. Thus the proportion of each type of fibre contained in fleece is also determined genetically (Ryder, 1965). Wild and primitive sheep do not usually possess hair fibres, whereas many of the modern and highly evolved breeds commonly possess all 3 types of fibre. Also wild and primitive sheep usually possess coloured fleeces, but the majority of modern sheep breeds are white-wooled in the main fleece area. The inheritance of colour in fleece wools is a complex genetic problem and is still an area of research today.

Colour in wool and hair fibre is caused by the presence of pigment, melanin, which is produced by dermal cells in the skin tissue in which the wool-growing follicles are situated. The substance is made up of tiny granules of two main colour types, which

have been identified as, brown-black and yellow-red (Ryder et al, 1968). However, colour is a personal sensation produced by rays of light entering our eyes. Colour perception is dependent on the colour sensitivity of the observer's eyes, the type and form of illumination and the light reflecting properties of the object. Furthermore, there is no defined set of colour descriptions in common use (Summer Ito et al, 1994). This fact has many consequences especially for naturally coloured wool. Particularly when reference is made to the British Wool News and Price Specification, where coloured wool is simply described as black or grey. It should be noted that for the white sheep farmer, dark wool fibres are a serious problem because there is no reliable test to allow identification prior to greasy wool processing (Fleet, 1994). Urine stain and non-wool contaminates in white wool, are readily controlled by simple management practices which has increased in importance in recent times with the development of several Quality Management Systems (AWC, 1993; Vandeleur 1993). In contrast, pigmentation faults in naturally coloured wool are usually caused by genetic factors and farm management demands knowledge of more sophisticated breeding practices (Fleet, 1994). As a result, many wool processors will not process coloured wool for fear of contamination of higher priced white wool, (as the carding machines are very difficult to clean). As discussed later in Chapter Three, if British naturally coloured wool farmers wish to become involved in later stages of production to add value to their wool, they must overcome processors reluctance to handle this product. This may be either by paying higher fees for processing, or the creation of a profitable market to compensate for the additional cleaning. Another option would be to assist the processors to develop more sophisticated carding machines etc which could aid

the cleaning process. An example of such possibilities are currently being undertaken by the New Zealand wool board, who is assisting the development of technology to create retail and consumer demand (WCM, 1998).

- **OTHER WOOL ISSUES**

This work has not discussed in any detail the genetics of sheep or how the various sheep breeds have different characteristics. Within each sheep breeding country, there are continual trials and investigations into how to improve the fleece, weight of the sheep meat, size of horns etc., (Wood, 1990). This has continued since t*he concept of heritability* was developed, (the measure of the degree to which an animal of superior (or inferior) phenotype may transmit this advantage or disadvantage to its offspring (Adalsteinsson, 1994). It is suffice to say, that a good understanding of how genes interact is required, to breed sheep, that not only provide a sound meat animal but also a high quality fleece.

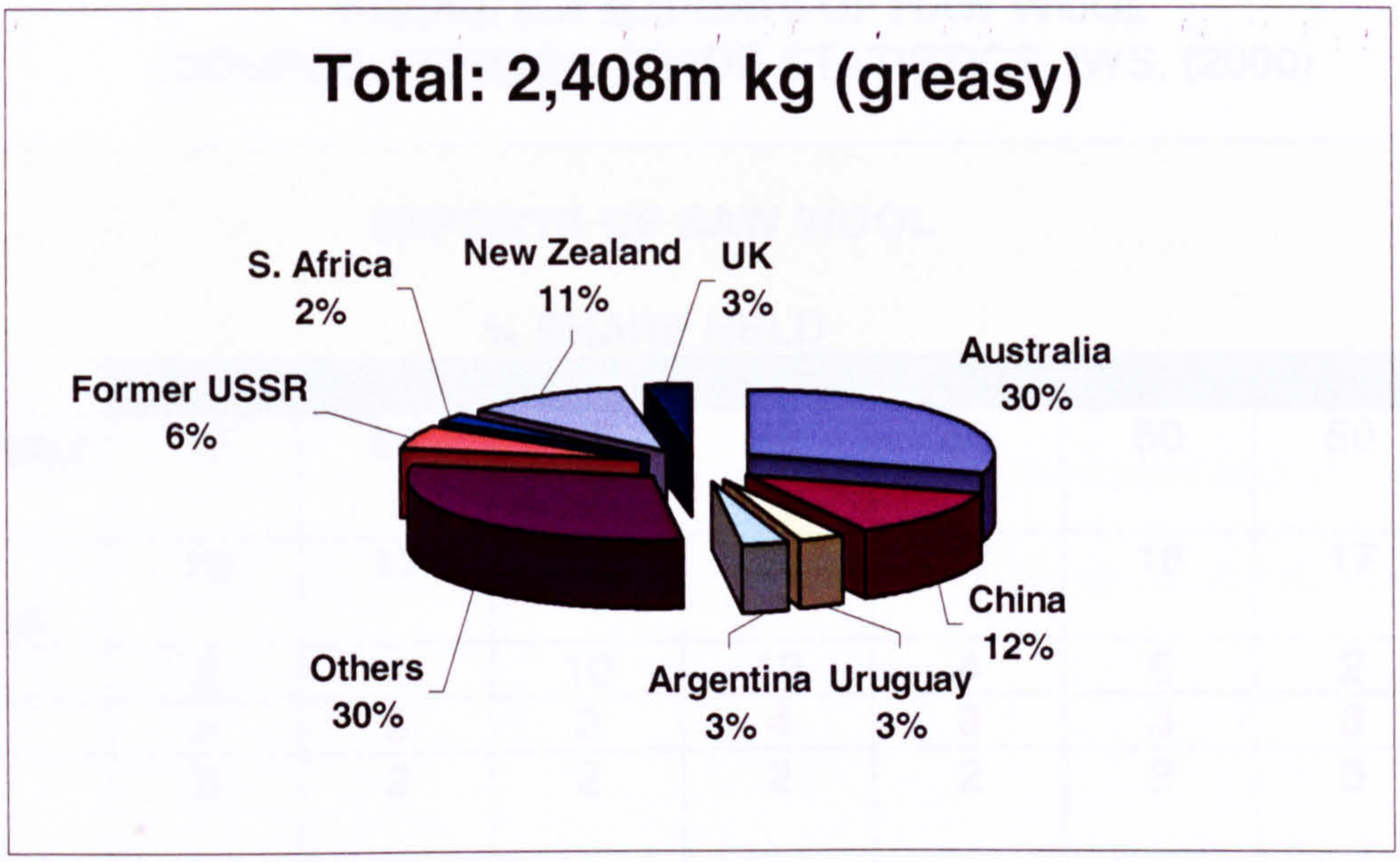
2.3 THE GLOBAL WOOL MARKET

To provide an understanding of how British wool is located within the global fibre market, it is necessary to investigate the market as a whole. The discussion will then be developed to include the UK market for domestic wool production for although wool is a global commodity, this research is specially interested in domestic production, manufacture and consumption of naturally coloured wool. This analysis will allow a comprehensive understanding of the economic and political factors that can affect the whole textile supply chain.

The world wool production figures used for comparison purposes are collected and disseminated by the International Wool Secretariat (IWS). The purpose of this organisation is to expand the use for wool throughout the world by optimising the profitability of member-country woolgrowers of the Southern Hemisphere (IWS, 2000). As such, the IWS is instrumental in the development of the wool industry and maintaining their own wool brands such as pure new wool and merino. Consideration of the implications of such a powerful organisational force in the global market place was undertaken. However, since the IWS is concerned purely with white wool production, their role was deemed to have little or no major affect on the British Naturally Coloured Wool market.

Figure 2.3, illustrates world wool production during 1998. From the graph, it can be seen that the UK is joint 5th in the world production of wool. Wool 's percentage share of the world fibre market however, is rather small at 3% of total global fibre production of 44312 mKg (IWS, 2000).

FIGURE 2.3 WORLD WOOL PRODUCTION, 1998
SOURCE: FOREIGN TRADE STATISTICS, IWS, (2000)



Even though the total market share is small, the wool textile market is still a major industry throughout the world, with many country's economies either based on or GDP contributed to by wool production. It should be noted that, wool is considered to be a manufacturing product. It is sold on the international commodity market, as yarn, semi-finished products and finished products to industry, home furnishing and apparel markets. In order to refine the research area it is first necessary to review the current state of the market at each stage of production. The following discussion briefly illustrates the 'markets' for each of the stages.

- **RAW WOOL PRODUCTION**

Table 1 in Appendix A identifies total sheep production between 1990 and 1998. Over this period the total number of sheep has decreased by 1184.1 mHead, with China being the only country to significantly increase production (+16.2 mHead) (IWS, 2000), the UK is currently ranked 9th in world sheep production.

FIGURE 2.4 EXPORTS OF RAW WOOL
SOURCE: FOREIGN TRADE STATISTICS, IWS, (2000)

EXPORTS OF RAW WOOL % SHARE HELD							
	1990	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**
AUSTRALIA	47	54	47	42	50	50	50
New Zealand	18	17	17	18	17	16	17
USSR	2	1	10	12	4	6	2
UK	**3**	**3**	**3**	**4**	**3**	**3**	**3**
South Africa	5	2	2	2	2	2	3
Hong Kong	0	2	2	3	3	2	2
Others	25	19	9	19	21	21	23
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Figure 2.4 identifies the UK as the world joint 4th exporter of raw wool in the global market (IWS, 1997). Although 3% of the export market is small, the 'Other' country category export percentages are below 23%. As a result, the UK could be considered to have some influence within the raw wool market. It should be noted that world statistics combine all the types of wool sold together. It is, therefore, impossible to

obtain a breakdown of these figures by wool type as the statistics collected are used to work out GDP etc., all that can be said with much certainty is that the majority of wool sold is merino.

The UK is ranked 3rd (IWS, 2000) for world imports of raw wool for processing in Western Europe (See Appendix A, Table 2). However, currently only one of the major importers of raw wool are found in Asia with China ranked 1st, Italy 2nd and France ranked 4th. Figure 2.5 illustrates that the UK's percentage of market share for imports has been steadily increasing since 1990. The only country to show any major change in postion within the market is Japan, who is importing smaller amounts of raw wool each year. This could perhaps suggest that Japan's textile processing for raw fibre is reducing and being replaced further along the supply chain or an example of the affects of the Asian recession.

From exploratory industry research, it became apparent that Japan in particular was a major export market for naturally coloured wool. An important fact uncovered during this research was a comment from a respondent, who stated that they thought that British Wools future production was 'going to China'. However, the current Asia recession (1998), is negatively affecting consumer spending in Japan especially for finished wool garment, as prices are very expensive. These points, combined with the belief that this recession may continue into China, could mean that these markets are lost not only for the sale of raw wool but also finished garments.

FIGURE 2.5 IMPORTS OF RAW WOOL
SOURCE: FOREIGN TRADE STATISTICS, IWS (2000)

IMPORTS OF RAW WOOL % MARKET SHARE							
	1990	1993	1994	1995	1996	1997	1998
China	3	15	21	21	19	17	18
Italy	12	11	11	10	10	12	12
UK	**9**	**8**	**9**	**8**	**9**	**9**	**8**
France	10	8	8	7	7	8	8
Germany	8	7	7	7	6	6	7
Others	58	53	44	47	49	48	47
Total	100	100	100	100	100	100	100

- **UK'S CONTRIBUTION TO THE WORLD RAW WOOL MARKET**

As previously stated the UK wool clip in weight of exports is ranked 4th in the global market. In order to consider the importance of the wool market in relation to the UK clip the following table identifies the total amount of wool sold through the British Wool Marketing Board since 1995.

FIGURE 2.6 BRITISH WOOL WEIGHTS HANDLED 1995 – 1999
Source: British Wool Marketing Board Annual Reports 1995 - 1999

BRITISH WOOL WEIGHT HANDLED Mkg					
	1999	1998	1997	1996	1995
Weight of wool sold	49.5	46.4	45.6	48.0	46.3
Weight of unsold wool in stock	7.3	6.3	3.8	5.0	6.2
Wool committed for forward sale	7.2	3.9	3.9	5.0	6.2

Figure 2.6 highlights that while the total quantity of wool is increasing per annum the amount of unsold wool is falling, suggesting that there is a growing demand for British wool.

FIGURE 2.7 CHANGES IN WORLD WOOL PRODUCTION

Source: BWMB Annual Reports, 1999

Changes in World Production			
	1990(mkg)	**1997/98(mkg)**	**Variation**
Australia	724	451	-38%
New Zealand	232	197	-15%
China	115	145	+26%
Uruguay	62	55	-11%
UK	**50**	**50**	**No change**
Argentina	79	37	-53%
South Africa	58	34	-41%
Others	677	463	-32%

Figure 2.7 illustrates the changes in world wool production between 1990 and 1998. It should be noted that although there have been significant decreases in production throughout the world during this time, Britain has consistently maintained annual wool production. This suggests that for British wool there is a relatively buoyant market. British wool is divided into 187 different classifications. It should be remembered that some of the wool classes include many different breeds of sheep. These are classified, as being of the same quality, but the ability of clearly identifying this wool type from this stage of production is lost. This is vital because the result is that it is not possible to obtain a detailed breakdown of wool production by sheep type.

2.4 WOOL FIBRE PRODUCTION MARKETS

Once the raw wool is purchased, the fibre is processed. The following discussion divides the production process into the three main stages within the supply chain.

- **SPINNING STAGE**

The first process to convert wool into fibre entails scouring and spinning of the wool. Investigations into the current production figures suggest that the Far East produce 28% of the world spinning production (see Appendix A, Table 3). Within Europe, the UK are the second largest producers of yarn, showing an increase of 2% since 1992 (IWS, 2000). It should also be noted that the level of spinning production has stabilised stage within Europe at 28% of world production (IWS, 2000).

- **MANUFACTURING STAGE**

This is the stage where yarn is converted into woollen, worsted, semi-woollen or semi-worsted fabric. Table 4 in Appendix A, highlights the decline within Western Europe for this stage of production since 1992, although within Western Europe the UK is actually increasing its production. Japan has significantly decreased its wool manufacturing stage by 1/3 since 1992, perhaps offering an opportunity for the buying of finished cloth or clothes, while China is illustrating a strong growing demand (+26%) at this stage of the supplychain (IWS, 2000).

FIGURE 2.8 TRADE IN WOOL YARN

(Source: Foreign Trade Statistics, IWS, 2000)

EXPORTS & IMPORTS OF WOOL YARN (Mkg)						
MAJOR EXPORT COUNTRIES	**1990**	**1994**	**1995**	**1996**	**1997**	**1998**
China	9.2	37.0	37.6	42.3	58.3	46.7
Hong Kong	22.3	39.1	34.8	36.2	38.6	34.3
Italy	15.2	29.2	27.8	33.6	37.2	34.3
Germany	18.6	24.4	23.0	23.4	22.9	23.1
UK	13.9	19.7	19.1	19.9	24.2	20.8
MAJOR IMPORT COUNTRIES	**1990**	**1993**	**1994**	**1995**	**1996**	**1997**
China	8.0	51.6	47.6	54.6	68.4	49.3
Hong Kong	28.8	44.9	40.0	42.6	46.5	40.1
Germany	13.6	18.1	17.1	20.1	21.6	21.3
UK	12.1	16.8	16.2	18.9	19.8	16.5
Italy	10.6	17.1	18.2	15.9	18.0	16.6
Japan	6.8	10.1	9.1	13.4	20.3	12.4

Figure 2.8 illustrates trade in wool yarn since 1990. The figure identifies the major countries that are involved with imports and exports of wool yarn. The UK's imports/exports result in an equal balance, with China importing more yarn than it exports, with Italy being the only country who exports more yarn than they import.

These figures may be explained by:

- The type of spinning equipment available in each country allowing only certain types of yarn to be made.

- ❖ The types of forward integration available for manufacturer into yarn being available within that country.

Referring to Tables 3 and 4 in Appendix A, it is possible to hypothesise as to whether the yarn produced in table one is actually processed by the spinning country. From the figures, it can be seen that only Italy has a consistently high surplus of market share. The UK has slowly been increasing its share of the manufacturing of wool fabric market.

- **RETAIL STAGE**

The consumption of wool garments will vary due to such items as current fashion trends i.e. if wool fabrics are being used; the climate of particular countries or the prestige to having a garment made from wool. The largest consumer by weight of garments are the USA followed by Germany, Japan and the UK. Appendix A Tables 5, 6, 7 and 8 provide detailed figures of the breakdown of the consumption of wool garments. From these tables, it can be identified that the major markets for wool cloth are for women's outerwear clothing (totalled 1917 mKg for the four highest consumption countries in 1998) (IWS, 2000). In order, they are USA, Germany, Japan, and then the rest of the world. The same total weight of garments is sold in both male and female adult knitwear. As the USA is the highest consumer of wool clothing, this must be viewed as an enormous opportunity to market British wool to the USA, which currently it does not seem to be exploiting to its full potential.

This section has briefly investigated the state of the world wool market from production through to final end user consumption. It should be noted that the major markets for British naturally coloured wool are China and Japan for all stages of production. With the world becoming more of a global market, such economic disasters as the Asian recession has a significant, affect all other countries wool supplychains. Such adverse affects could depress raw wool prices, although this would not have an immediate adverse affect on the retail end of the market. As a consequence of the decrease in wool prices, the total number of sheep and quantity of the raw product may fall in the future, which, will eventually produce price rises at the retail end of the market.

2.5 THE MARKETING OF BRITISH WOOL

To understand the role of naturally coloured wool within the British wool market it is first necessary to consider the dominating role of the British Wool Marketing Board (BWMB). It is also pertinent at this stage to investigate the actual size of the British wool supply system and to consider the findings of exploratory research undertaken within the first two stages of the supply chain to assess industry views on the naturally coloured wool industry.

- **THE ROLE OF THE BRITISH WOOL MARKETING BOARD**

Currently, the British Wool Marketing Board (BWMB) (created in 1950) is the only government formed agricultural marketing scheme still in existence. All other government schemes, which originally guaranteed payments to producers, have been replaced by private organisations. Even this limited concession has been selectively withdrawal by the government, with the result that payments to producers are now the result of auction prices alone.

The BWMB's (1999) stated main objectives are to achieve the best possible return for British Wool; to provide a marketing service at the lowest possible cost and to stimulate demand for wool through product development and promotion. As the 'governing' body of the wool supplier – distributor network, the BWMB has an enormous impact on the viability of the British Wool market.

The longstanding existence of the BWMB as a centralised monopoly buyer and seller of virtually all wool has had other effects, which despite it's aims, have conspired to hinder the development of small-scale coloured sheep businesses. The fate of the British wool market has rested in the hands of the BWMB with almost all wool expertise and resources have been concentrated in a single system devoted to handling the entire British wool clip. (Woodhead, 1994)

- **THE BUYING PROCESS**

In order to perform its function the BWMB assumed control over the wool merchant firms in 1950. Even today, although a number of wool merchant operations are registered as separate subsidiary companies, the BWMB maintains its control by entering into contracts through the Agents Negotiating Committee for the collection, grading and storage of wool.

- **COLLECTION AND GRADING OF WOOL**

As previously explained, the wool clip consists of a number of fibre and wool types. On a pre-set date the clip is collected from the producer, by an allocated authorised agent and sent to regional depots. On arrival, the documents for each clip are completed, for the weight of wool contained in each 'sheet' (collection/storage bags), and the 'sheet' number. The 'sheets' are then moved to a storage area to await the grader's assessment, and the documents are passed to the grading staff.

Trained graders undertake grading of the wool clip. This is known collectively as

traditional subjective appraisal methods. These methods rely on the grader's experienced observation of wool by visual and tactile means and do not include the use of any measuring apparatus. Each producer's clip is examined at one time. The graders are supposed to examine all unopened individual fleeces, however sometimes a random sample from a producer is undertaken with reference to the type of clip quality from the previous year to check the consistency of the flock clip.

The objective of the examination is to class the fleece into a specific numbered grade which nominally relates to the textile quality of the wool and which determines the price per kilo to be paid to the producer. Although observation of graders shows them able to identify a number of faults, which are subject to penalty, clearly examination of, fleece quality from a rolled fleece is somewhat arbitrary and relies on judgements of a wool staple drawn from it. Wool fineness, which relates to fibre diameter, is still estimated by using the Bradford Count Quality Number. However, more measurements are now being made of fibre diameters in microns. This process is possible by cutting the fibres into short lengths and measuring their diameters using a projection microscope. Both crimp and resilience can also be measured and, together with fibre diameter, give a reproducible measure of quality (Bowie, 1994).

It should be noted that the quality of a fleece varies over the body of a sheep. There is no guarantee from which area of the fleece the staple will be taken, therefore, the fleece could be said to be of high quality/low quality and the rest of the fleece may not

correspond to the sample. Once graded the fleece is 'binned' with other producer clips of the same grade. On being placed in a 'bin' the producer clip loses its identity the wool is thereafter identified by its BWMB classification number and wool quality alone.

Once the wool has been shorn, it is graded into various wool grade classifications and in general, the sheep breed brand is lost. This, therefore, makes detailed market comparisons difficult as unlike merino – the Australian/New Zealand sheep breed (which is homogeneous in nature when considering the quality, texture etc) the UK has 34 main breeds, 12 minor breeds, 5 rare breeds as well as many hybrids and half-bred sheep. British wool is therefore graded into 187 classifications, which do not necessarily equate to breed types.

Once the 'bins' are full the fleece is bailed and a sample sent to auction houses for buyer preview. Sample bales of each lot offered for sale, are opened, on the preview day preceding a sale, to allow examination. Catalogues list the lots to be auctioned, the weight of each lot and the depots where they have been graded and stored. The BWMB limits the sale of wool by issuing a reserve minimum price for each lot. Occasionally the BWMB itself buys wool for research and development purposes, when it must bid at auction as well.

The BWMB's payments to producers reflects the average market price paid over the past twelve months for a particular grade less deductions for clip presentation faults, with defective wool being graded into separate fault grades. Currently, the highest amount paid per kilo is 88.8p for the classification of Extra Fine Wools No. 1(BWMB, 2000), this is in stark contrast to classification Shetland Dark Grey & Black or Dark

Herdwick which earns 3 pence per kilo. It must be emphasised that the fleece will only earn this price if it is graded as not possessing any graded wool faults, for each wool fault the price per kilo is lowered between 10 - 30p per kilo (BWMB, 2000).

- **MARKETING OF BRITISH WOOL**

The main objective for the BWMB is to market the UK clip. In order to fulfil this objective the BWMB takes a contribution from each producer's annual payments to support marketing activities. The BWMB Committee then, makes the decision on how best to maximise the spending of this money during the following accounting year.

Figure 2.9 illustrates the amount of monetary resources allocated to marketing from 1995 - 1999. It should be noted, that the term 'marketing' in this case covers a wide range of activities which include advertising auction dates, printing catalogues etc. for the sale of the clip, to educating the general public about the benefits of wool products. The BWMB also provides assistance to carpet and clothing manufacturers, in the education of the general public on the attributes of wool, the identification of the British Wool brand and wool research. In many cases, especially for carpet manufacturers, joint advertising campaigns take place between trade organisations and the BWMB, to consumers to promote an understanding of wool's properties etc. So, the BWMB in fact markets British Wool throughout the supply chain.

FIGURE 2.9 MONETARY RESOURCES TO MARKET BRITISH WOOL
(Source: BWMB Annual Reports 1995-1999)

£'000's	1999	1998	1997	1996	1995
British wool promotions	558	524	561	557	398
Wool handling development	18	32	37	21	15

- **MARKETING OF NATURALLY PIGMENTED (COLOURED) WOOL**

Previously, this research has examined the general wool market. The discussion now concentrates on the naturally coloured wool market. For the purposes of this research naturally pigmented (coloured) wool is any colour of wool fibre which has not undergone a dyeing process resulting in a specific colour for example white, brown, grey, black etc. The British Fleece Wool Grades, containing 'coloured wool' in the description, can be seen in Appendix A.3, Table 1. It should be noted that the breed identifiers (brands) are lost when the fleece is binned, except for a few categories such as Jacob and Shetland. Exploratory research identified that within the supply chain, there was confusion amongst buyers, who could identify wool by the breed identifier or the British Wool Classification number not both. It would, therefore, seem important for a consistent method of classification to be applied and the separation of naturally coloured wool for succeeding stages of production. There are various specialised markets for naturally coloured sheep and wool these include: -

- **PRODUCTION OF NATURALLY COLOURED WOOL SHEEP**

Pedigree Breeding

Many breeders with small flocks of primitive or traditional breeds aim to sell their lambs primarily as pedigree breeding sheep (Woodhead, 1994). As such, these producers take great care in their product in both their breeding and husbandry practices. These are carried out with extreme care with the aim of producing a colour, which is in demand, and producing uniform quality. These producers are aware of the genetic and management factors associated with their industry (Vinnicomb, 1994). Also, within the white flock the coloured or part coloured lamb tends to be retained. This is because of the current increase in interest of home spinning production. While, many lambs are retained simply because they are considered 'fashionable' (Vinnicomb, 1994)

Breeding of NPW for Meat

As flock sizes increase, the problem of getting acceptable returns from some types of coloured wethers leads breeders to use a white Down type ram, thus enabling the finished lamb to qualify for subsidy payments, while the flock ewes provide coloured wool (Woodhead, 1994). Such practices result in a two-fold dilemma for the NPW market. As the appearance of a coloured sheep in a pedigree, white flock must have resulted from crossbreeding. And secondly, certain breeders who cross white longwools or other breeds with a dominant black breed, and then identify the progeny as pure coloured versions of the breed in question. Even where no deception is involved, there is concern that the use of dominant black breeds to introduce colour into flocks could lead to loss of breed identity in a large proportion of the national coloured sheep

population. Thus, this would threaten the identity and reputations of all pedigree coloured sheep and their breeders (Woodhead, 1994).

Processing of NCW

Exploratory research uncovered that many wool processors prefer not to handle or process naturally coloured wool, to the extent that they would only process it if there was no other work available. In some cases, wool manufacturers specify a maximum of only 10 dark fibres per kg of top. As wool processing involves very thorough blending of the fibre, any clumped dark fibres become widely dispersed through the processed wool. As a result, this 'fault' may not become apparent until the fabric or garment stage. In white or pale coloured woven fabrics the pigmented fibre appears as a dark line whereas in woollen garments it appears as a smudge (Vandeleur, 1993)). Furthermore, dark fibres can contaminate white fibres due to poor cleaning of carding and spinning machines etc and so many spinning firms will not process naturally coloured wool.

Exploratory research has identified that whilst the colour of naturally coloured is of great concern to the processor, those involved in the later stages of production perceive no significant differences between naturally coloured and white yarn. Once the naturally coloured wool is converted into yarn, it is virtually identical in handling properties to white wool that has been specifically dyed. Therefore, for the producers of naturally coloured wool the most important person in the early stages of supply chain is the processor, who effectively controls the amount of naturally coloured wool being produced. They are also able to generally dictate the prices of processing the wool to farmers who are trying to

add value themselves. As long as demand for naturally coloured wool is relatively slack, then, the processor will continue to hold the balance of power. However, should demand increase from either industry or consumer markets, it is unlikely that the British naturally coloured wool farmer and processors could meet this demand in the short to medium term.

Exemptions to the BWMB Scheme

The legal requirement of the BWMB scheme (1950) requires wool producers with more than 4 sheep to register and sell all their fleeces to the wool board. Exemptions are possible for certain rare breeds but this licence is only available for 12 months at a time and are subject to unilateral change by the BWMB. The effect of these limited exemptions is to confine wool producers to selling raw fleece only to individual handspinners and to prevent them from selling through co-operatives or dealers. (In the late 1990's, some breed groups are trying to overcome this dilemma by purchasing the fleece at auction for processing in order to obtain added value). Individual producers are legally prevented from adding value by selling wool in carded form or by having the wool spun on commission and made into finished products, which was not first sold to the BWMB. The 'discriminatory exemption in favour of some rare breeds distorts competition between breeds and leads to a narrowing of the range of coloured wools that can be offered to buyers' (Woodhead, 1994).

General marketing

With direct contact between producer and user discouraged by the wool sales ban, little could be done to create awareness and a market for specialised fleeces. Furthermore, lacking critical and demanding handspinning customers, producers were not encouraged to remedy their own inexperience and possible defects in their wool. There are signs however that the recent exemptions may bring about an oversupply of fleeces since the producers of large numbers of black fleeces previously sent to the board are now trying to sell them privately to handspinners (Woodhead, 1994)

In order for naturally coloured wool producers to obtain a reasonable return Woodhead (1994) suggests that there should be specific coloured sheep and fleece sales, and a code of practice for selling fleeces, developing a marketing strategy recognising that specialist producers should therefore aim at a high quality product, attractively packaged, informatively labelled for specific uses. Higher prices, which justify the costs of specialised wool production, can only be obtained by wool, which is seen to be different from that offered from by-product flocks.

The BWMB could take advantage of lessons learned in Australia regarding the marketing of naturally coloured wool. Within the Australian wool market, the white wool auction system had never been geared to properly market coloured wools. Indeed for the most part coloured wool has usually been of nuisance value in the system, and returns have reflected this (Bennett et al, 1994). As a result of this, naturally coloured wool producers resorted to carding their own fleece. Apart from marketing the finished

yarn and clothing, these producers identified markets for washed and carded fibres. Quilters are now purchasing whole or half batts to match bed sizes for use in their crafts. They prefer the natural wool fibre for quilting in preference to synthetics. While feltmakers, especially those making quantities of felt goods for sale, are using more carded wool, saving themselves much time in preparation. Finally, toy makers are also using wool for safe and soft stuffing

Particularly today, supplying to the hand spinning craft is a highly specialised industry. The increased interest in hand crafted and 'natural look' wool products, has resulted in small enterprises commencing trading for the manufacture of naturally coloured or pigmented wool products under factory conditions (Vinnivcomb, 1994).

As naturally coloured wool is purchased by the BWMB and sold at a low price, breeders are reconsidering whether they really want to continue to breed and sell sheep. This is specifically pertinent to naturally coloured wool, as the returns are simply not there. Coloured sheep farmers still have to pay the same price for shearing, classing, wool cartage and the various other wool auction costs whilst not receiving the promotion of wool that white wool receives. As a result of this down turn in prices, many breeders are trying to directly sell their wool to end users or marketing from the 'farm gate'. Direct selling to end users occurs as many home spinners and specialists buy directly from producers to avoid middleman costs and to obtain the pick of the wool (Vinnivcomb, 1994).

Possible reasons for a limited market for Naturally Coloured Wool

There are many reasons identified for wool still being held by wool boards at the end of the wool season they are (Bennett et al, 1994; Vinnicomb, 1994): -

1. Over production of fleece for the market to absorb
2. Not enough time and energy have been spent in marketing strategies
3. The fleece is of good quality but a common or uninteresting colour
4. The fleece has grown stale
5. Limited demand – as this is a specialist trade there is often limited demand. Often this limited demand is as a result of small lot sizes. Overseas orders cannot be met because the required lot size in the required colour is unavailable.
6. Purchasing of wool at any given time during the year

Within the UK points 1, 2 and 5 are controlled by the BWMB. The producer can overcome point 3 through genetic understanding, while point 4 can be assisted by the producer with better storage facilitates. It can, therefore, be seen that if these problem areas were overcome, that any stock piles of naturally coloured wool would be reduced, possibly resulting in higher auction prices for the current wool clips.

2.6 CHAPTER SUMMARY

The role of this chapter has been to provide the reader with an understanding to the background of this research. The main conclusions important to this research are: -

1. British wool production is currently characterised as fragmented and of relatively minor significance to the British economy. As a result, wool production is perceived by many farmers as a tertiary activity.
2. However, those involved with the production of naturally coloured sheep and wool could be classified as 'hobby' farmers. Many of who are highly educated and seek out current research into animal husbandry and wool quality improvement.
3. Ironically, the survival of many of the British naturally coloured wool flocks is due to the relatively uncommercial attitudes of the 'hobby' farmers, in stark contrast to their commercial counterparts.
4. There are many factors that are making it difficult for naturally coloured wool marketing to develop to its true potential. These include: -

- Lack of support by processors
- BWMB's main interest in carpet manufacture
- BWMB being the monopoly buyer and seller of wool in the UK
- The British wool classification system converting 51 breeds into 187 classes and the resultant loss of breed identifiers.

5. Although the environment in which naturally coloured wool operates is very hostile recently it has shown signs that it may be possible for it to carve a meaningful and lucrative niche in the UK wool market.

6. Possible options to improve the current potential were then discussed, these included: -

- Specific coloured sheep and fleece sales
- Code of practice for selling fleeces
- Using washed and carded fibres for use in craft industries such as quilting, felt making, etc,
- Having the yarn processed and selling it as wool, cloth or finished clothing

Ultimately, if those involved in naturally coloured wool production, are to succeed, they must develop a marketing strategy which accepts the fact that in order to command higher prices consumers must see that there is something different or special about the products. One possible way of achieving this would be to consider repositioning the image of naturally coloured wool in the eyes of those within the supply chain. Thus, combined with a strong marketing strategy, could assist in developing a securer future for naturally coloured wool.

2.7 REFERENCES

Addalsteinsson, S., (1994), Key Note Address: Visions in wool – past and present in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK, *pp 4 – 15.*

Alderson, L., (1989), Breeds of Coloured Sheep in Great Britain and their potential value, in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK, pp 220 – 224.

Australian Wool Corporation (AWC), (1993), Code of Practice for Preparation of Australian Wool Clips, Australian Wool Corporation, Melbourne, Australia.

Bennett, A.; Bennett, N.; Gregor, N., (1994), Carded Fleece Production for Hand Spinners, in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK pp 176 – 185.

Bottomley, G.A., (1979), Weather Conditions & Wool Growth, in BLACK J L, REIS P J, (Ed), *Physiological and Environmental Limitations to Wool Growth*, University of New England Publishing Unit.

Bowie, S.H.U., (1994), Shetland Wool & its Characteristics, in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK pp 120 – 129.

British Wool Marketing Board, (1995 – 1999), *Annual Reports*, 30 April (1995 – 1999), British Wool Marketing Board, Bradford.

Carter, H.B., (1964), *His Majesty's Spanish Flock,* Angus and Robertson.

Clutton-Brock, J., (1976), The animal resources, in *The archaeology of Anglo-Saxon England*, Ed Wilson, D. M. Cambridge University Press.

Fleet, M.R., (1994), Control of Pigment in White Sheep – Commercial Relevance and Mechanisms involved, Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK, pp 25 – 36.

Hald, M., (1980), *Ancient textiles from bogs and burials*, National Museum of Denmark.

International Wool Secretariat, *Wool Facts*, 1990-1997.

Kirby, H.; Sobey, E. J., (1994), A Comparative Study of White and Coloured Wool taken for Jacob Sheep, in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK pp 110 – 119.

Lawton, R., (1978), Population and Society 1730-1900, in *An historical geography of England and Wales*, Ed Dodgshon R. A. and Butlin R. A. Academic Press.

Nolan, C., (1986), Sheep Management to influence the length and strength of wool, in *Wool Technology & Sheep Breeding*, June/July, pp 72 – 74.

Postan, M.M., (1972), *The mediaeval economy and society*, Pelican, (1978 Ed).

Ryder, M.L., (1965), The history of sheep breeds in Britain, *Agricultural History Review,* Vol. 12.

Ryder, M.L., & Stephenson, S.K., (1968), *Wool Growth*, Academic Press, London and New York.

Ryder, M.L., (1981), A survey of European primitive breeds, *Ann. Genet. Sci. Anim.*

Ryder, M.L., (1983), *Sheep and Man*, Duckman, London.

Ryder, M.L., (1989), Bucking the trend with coloured wool, in Erskine K. (Ed) Coloured Sheep and their wool, Proceedings 3rd World Congress on Coloured Sheep, Black Sheep Press, Oregon, USA.

Ryder, M.L., (1990), Wool Textile Research, *The Sheep Farmer,* July.

Ryder, M. L., (1994), Wool: the ideal textile fabric, *Biologist,* Vol. 41, 5.

Stewart, I., (1979), The Sudden Increase in Sheep Producing Coloured Wools for Industry for New Zealand, in *Breeding Coloured Sheep and using Coloured Wool,* Peacock Publications, Hyde Park, South Australia.

Summer Ito & Wakamatsu K. (1994), Using objective measurements to understand the biology of wool colour, Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust, York UK.*

Wood, F., (1990), Quality Wool, *The Sheep Farmer,* May.

Woodhead, M.J., (1994), British Coloured Sheep Breeding & Wool Production, in Erskine K (Ed), Coloured Sheep & Wool: Exploring their beauty and function, Black Sheep Press, USA, pp 86 – 90.

Woodhead, M.J., (1994), Conservation in Cornwall: use of primitive sheep for conservation grazing, in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK,161 – 165.

WCM, (1998), Wool: Brave Words Hard Facts from WONZ, Wool Clothing Manufacturer, 78/10, pp 22 – 23.

Woolmark Business Intelligence (IWS) [WWW] Available from http://www.wool.com/intelligence/currentissues/faq/faq02.html

Vandeleur, P., (1993), ClipCare – the quality story of the Australian wool clip, *Wool Focus*, 1 (4) pp 4-7.

Vinnicombe, M., (1994), The Australian Coloured Sheep and Wool Industry: Where are we heading?, in Alderson L. (Ed), Coloured Sheep and coloured fibres of animal origin, *The Proceedings of The World Congress on Coloured Sheep, Rare Breeds Survival Trust,* York UK,161 – 165.

CHAPTER THREE

3.0 INTRODUCTION

The previous chapter provided an insight into the market dilemmas for naturally coloured wool. One of the building blocks necessary to overcome these challenges would be to develop a deeper understanding of the marketing principles currently applied to wool as it passes through the supply chain. It should be noted that as the product is processed it moves from agricultural to consumer marketing. Therefore, an understanding of both agricultural and general marketing is necessary to assist in any strategy development for naturally coloured wool.

The term 'agricultural marketing' normally refers in the literature, to the marketing of products such as eggs, beef, cereals etc. As such, wool is not generally classified as an agricultural product. Nevertheless, it has been argued in Chapter 2, that wool production cannot be separated from the production of sheep meat and furthermore, that it should be treated, as an agricultural product in it's own right. With this in mind, this research will explore the realms of agricultural marketing in order to highlight principles which are applicable to the current predicament of the wool industry and naturally coloured wool in particular.

3.1 AGRICULTURAL MARKETING

Kohls (1997) defined agricultural marketing as,

'.. the performance of all business activities involved in the flow of goods and services from the point of the initial agricultural production until they are in the hands of the ultimate consumer'

This is an all-encompassing quote, which seems to portray agricultural marketing as a seamless operation covering the whole spectrum from farm gate to the final consumer. Whilst it sounds plausible in theory, does it occur in practice? In fact, 'marketing' at best only takes place between the producer and the next member in the supplychain. To understand how this has developed it is necessary to understand the socio-economic factors that have impinged on the development of agricultural marketing. For the most of human history, activities commonly associated with what has become known as "agricultural marketing" have been relatively unimportant (Padberg et al, 1997). With transport hampering distribution and the development of nearby markets, most of the output has been used to satisfy local demand. However, from the post industrial revolution era to the present day, there has been a progressive increase in the distance between production and consumption as well as the sharpening of the division between agriculture and the swelling urban ranks. As this has occurred 'value' has been added to the product as it moves through an increasingly sophisticated supply chain from the producer to the final consumer, which has assisted the development of a consumer-based society.

However, the sophistication of the supply chain has served to alter the nature of the connection between the farmer, the land he toils and the local hinterland that provided a ready market for his produce. In the latter part of the twentieth century, globalisation, improved communications and demographic changes have left the local farmer far more vulnerable to both national and, increasingly, international competition. More importantly, at the same time, the complexity of the modern supply chain has also helped to exacerbate the lack of contact between farmers and those beyond the farm gate. This has only served for the most part to reinforce a production as opposed to a marketing orientation amongst farmers.

In this context, therefore, agricultural marketing theory can be seen as a response to the vulnerability that the agricultural community felt in the face of these developments. As a result, the main strategies developed by agricultural marketing academics have tended to revolve around the perceived need to balance the ongoing concentration on agricultural facilities on farm production, economics and management with a focus on post farm-gate activities (Padberg et al, 1997). However, whilst the academics are supportive of this approach, it is farmers who need to be fully convinced of the need to change their focus.

- **THE DEVELOPMENT OF AGRICULTURAL MARKETING**

Agricultural marketing as a recognisable discipline first flourished during the first half of the twentieth century, with noted academic study commencing in 1910 (Webster 1992) and books first published in the 1920's (Jones et al, 1990), where it developed as a branch of applied agricultural economics. This discipline was mainly concerned with the understanding of behaviour, functions of agricultural commodity markets and the affects of government policies to control commodity marketing through the developments of co-operatives and marketing boards.

As a result, the academic discipline of agricultural marketing developed differently from mainstream marketing. Bateman's (1976) classic review article stated that whilst 'mainstream' marketing has developed a business orientation, agricultural marketing has taken a policy one. On the surface, as exemplified by Kohls' (1997) defintion given above, it may appear that both share a common language. Furthermore, Barker (1989) states that it could be assumed that in common with their industrial counterparts agricultural consumers 'will be interested in purchasing what they want at the lowest price and conversely farmers may be interested in obtaining the highest possible returns'. Despite this superficial commonality, however, it is apparent that they have great difficulty in communicating with each other. Indeed, Padberg et al (1997) suggests that it is only in the last fifteen years that some fusion has taken place between agriculture and general marketing.

- **MODERN AGRICULTURAL MARKETING**

As general marketing has developed, a series of business orientations have been identified (Levitt, 1960; Drucker, 1973; Borch, 1957). It is posited that as an organisation becomes more marketing focused the exchange processes with its consumers should become more profitable. It could, therefore, be suggested that agricultural marketing producers operate within the same continuum. If they are production orientated, they produce large quantities of beef, cereals etc., hoping to find a buyer for the product. If producers are sales orientated, they attempt to increase the demand for existing goods by increasing advertising spend. The marketing orientated producer, however, understands the supply chain and consumer and, therefore, applies this knowledge in strategic decision making. In theory the producer can move through the continuum, develop a marketing orientation and as a result make a profit.

In reality, however, despite the presence of these more mainstream orientations, it is primarily the production orientation that is in control of the agricultural sector (Barker, 1989). This research has uncovered that even producers who believe they are marketing orientated, are unable to understand why others in the supplychain and end consumers will not purchase their products. This serves only to reinforce the traditional view that the task of the farmer is to produce those commodities which fit into his farming pattern, and from there it is the task of the merchant to find a market for the finished product (Barker, 1989). Even today, with the advancements of farm technology and techniques, for many of the people who farm, it is land quality and its location that dictate to a greater extent the type of 'product' they produce. Thus, in

order to make a living they are forced into production orientation. It is therefore, the task of the agricultural marketer to raise the sights of the producers to matters beyond the farm gate, in order to develop exchange processes throughout the supplychain. The main factors that continue to foster the production orientation perspective are:

1. Production

It can be quickly seen that the producer has very little control over the output of their production, unlike non-farm firms. Weather, disease and patterns of reproduction are difficult to control and all affect the quality of the product. Most crucially, the producers' inability to quickly adjust to changing conditions creates 'high risk' in agriculture.

2. Location

For many producers the geographical location dictates the production opportunities, as well as the distance from (end) consumers. The decision then is whether to continue or not, and to ensure a market for production at all costs.

3. Control in the supplychain

As the output from each producer is a relatively small amount of the whole, the individual producer does not have any control or little influence over how the total product continues through the supplychain. One result from this is limited understanding of substitute products and the trends of demand. An understanding of these items is fundamental to the marketing orientated producer who can anticipate and adapt to change. However, because of the long-term nature of the naturally

coloured wool production cycle many things may change before the cycle is complete and production is available.

4. Changes in demand

Barker (1989) states that most agricultural production is carried out in anticipation of demand. In relation to specialised naturally coloured wool, the time span between an initial decision to produce and the product being ready for the consumer market can take up to 1 or 2 years. As specialised naturally coloured wool is destined for the fashion market, it should be remembered that trends and styles change every season. It is, therefore, important that the producer feels confident that the product being produced will be required not only when produced but also because of a high level of investment, for a relatively long period of time to recoup expenses. Due to the fluctuations within the fashion market, it is not possible to guarantee that the demand for the product will be sustainable.

As an additional concern, if local production does not meet demand (for example not provided yet/not enough quantity), global substitutes can be purchased from abroad to ensure that the consumer market is satisfied. This may result in the permanent loss of market for the U.K. producer.

- **NATURE OF THE DEMAND FOR AGRICULTURAL PRODUCTS**

The demand for agricultural products is similar to other products where the consumer bases consumption on utility, satisfaction and price. For example, classical economics informs us that, if a person is on such a low income that they cannot afford food then any additional income will be spent mainly on food. Conversely when the same person has a high level of income food consumption becomes less important and other purchases will be made.

When considering the purchasing of wool clothing a similar analogy can be applied. If a person is on a low income, they will normally purchase clothing from a limited number of outlets and the material of the clothing will be of less quality and poorer grades of wool providing them will a perception of wool characteristics. However, when the person has a high level of income they are able to purchase in more varied outlets and the range of clothing materials extends to luxury products such as silk and cashmere with perhaps the view of wool clothing being seen as mainly functional.

Unlike food, lowering the price of wool clothing will not necessarily increase demand for the product (only so much clothing can be hoarded), as there are many other factors to take into consideration such as style, peer group pressures, weather, storage, etc.

FIGURE 3.1 THE STATES OF DEMAND

Adapted from Kohls et al (1997)

DEMAND STATE	DESCRIPTION
Negative demand	A situation where the consumer dislikes the product and will not buy it.
No demand	Where the consumer is unaware of their need for the product
Latent demand	Occurs where there is demand but no product
Faltering demand	Refers to consumption which is declining or failing to grow
Irregular demand	Where the demand fluctuates throughout the year i.e. fashion
Excessive demand	A situation where high levels of consumption may prove detrimental to the producers – new entrants.

From exploratory investigations into this market, producers believed that consumers were in a state of negative demand. However, empirical research has identified that there is latent demand among consumers. A major potential threat, inherent in this for producers of naturally coloured wool is excessive demand, as they may not be able to meet sudden demand, allowing an opening for substitutes. As a consequence of this, any increase in the demand for any of the final products must be strategically managed not by an individual (as no one producer can produce enough) but by a group to work for the best situation for the producer.

In order for the producer to become more marketing orientated, decisions concerning his own operation must be made answering such questions as: -

- What to produce?
- How much of the marketing job should be undertaken by the individual, group or organisation?
- What can be done to expand markets and by whom?

Within a 1 to 2 year production cycle the farmer needs to consider planning on a strategic long-term basis. With specialised naturally coloured wool, the research has identified that in order to provide the basis for strategic marketing planning, there is a need to alter perceptions of the product within the supplychain. There is also a requirement to develop a need for the product by the final consumer.

- **THE BENEFITS OF MARKETING PRINCIPLES FOR PRODUCERS**

Despite the production orientated viewpoint expressed so far in this chapter, there is evidence that some modern agricultural enterprises are embracing more sophisticated techniques to help ameliorate the uncertainty common in modern agriculture. Research was undertaken on 24 farms analysing how business-marketing strategies were applied. Surprisingly, they found that farmers typically utilise more sophisticated marketing strategies than is normally recognised (Padberg et al, 1997). This suggests that there is a need to see the application of modern marketing techniques at the farm level not as such the adoption by the producer of the marketing concept but as an aspect of contemporary strategic marketing management theory, which incorporate

concepts from strategic management and economics (Porter, 1980). For this research, therefore, the marketing orientated farmer will be considered to be the one who considers all aspects of the sheep and tries to maximise profitability on the wool.

Whilst some commentators believe that the individual producer can benefit from the application of marketing principles, in the modern marketplace the emphasis is increasingly on the ability of farmers to combine their resources. Thus many writers (Johnson, 1997; Henehan, 1997; Lang, 1997; Sargent, 1992; Le Vay 1983) view co-operatives as the main vehicle through which producers can attain economies of scale and a better market position within the supplychain. In order to understand the state of co-operative and co-operation ventures today, it is necessary to briefly review the somewhat chequered development of co-operatives in Britain.

3.2 THE ROLE OF CO-OPERATIVES IN BRITAIN

Before the development of co-operatives in the modern sense, co-operation was normally manifested in worker co-operatives mainly as a response to socio-economic factors such as the high price of corn and the existence of a local monopoly (Cole, 1944). Other co-operative initiatives were the product of enlightened minds, such as Robert Owen (the son of a Welsh saddler). Owen was a very successful mill owner and he created model conditions for his workers at New Lanark in Scotland in the early 19th Century. He proved that it was possible to run a large cotton mill at a profit without worker exploitation (Cole 1944). However, these social 'experiments' led a tenuous existence 'within a theoretical framework that favoured capitalist property, class conciliation and middle-class democracy, young republicans had constructed an essentially working-class organisation with a programme of worker's associations that would undermine the basis of capitalism and the industrial middle class ' (Moss, 1975). While Holyoake (1879) when talking of the 1820s stated that, the term 'co-operation' was 'tainted in the minds of most of his contemporaries by its association with the menace that was communism'.

The Rochdale Pioneers first formally set out the co-operative principles in 1844. These Principles incorporated their own ideas with some of the Owenite ideology of uniting production, distribution, education and government within a single community. What distinguished these Principles from others was the fact that they gave the consumer an identifiable financial stake in the success of the society. Nevertheless even for reformists,

such as, Beatrice Potter producer co-operatives were viewed as 'heroic failures', an indication of the aspirations and abilities of those working class people who established them, but ultimately doomed to failure'. Much of the debate on co-operatives has been focused on whether they are successful as a form of organisation. Unfortunately for the co-operative cause, Potter's (1891) view of the producer co-operatives prevailed until the re-emergence of the debate on workers' control in Britain in the 1960s and 1970s when the labour movement became committed to socialism based on nationalisation and to co-operation based on the consumer movement. Until that time, producer co-operatives were to become an ideological backwater with a resultant decline in numbers. Many academics since then have highlighted the idiosyncrasies of the UK farmers as a fundamental reason for the failure of co-operative development. This research does not suggest that co-operative type organisations do not work, but that inherently the individualism of the British producer makes it very difficult for these groups to operate successfully for long enough to see a return.

- **GOVERNMENT INVOLVEMENT AND AGRICULTURAL MARKETING**

Given the inability of co-operatives to gain any foothold within the liberal democratic psyche of the middle classes the only other source of any impetus to develop the co-operative ethos was central government. Thus, any comprehensive study of co-operatives must include the governments' role in the creation and success of such organisations. Grants and subsidies provided by government either acts as a promoting or condoning mechanism in their creation and development. 'Periodically, governments

of the UK have consistently encouraged alternatives to co-operative marketing which have had the effect of either hampering the development of co-operatives or of making it appear that they are a second best channel ' (Foxall, 1982).

For the most part in Western economies this onslaught of competition has been left relatively unchecked by Government's mainly schooled in the virtues of "laissez faire". Even today, this trend continues as throughout the world governments persist in their efforts to lessen their hold on agricultural markets thus further exposing producers to market forces (Padberg et al, 1997).

The British Government began to exact direct influence in the 1930's through a policy of establishing and stimulating marketing boards (see Figure 3.2). Even as late as the 1960s this form of statutory marketing was frequently regarded as providing the solution to problems of distribution and marketing of cereals and meat products. During the 1940s the price guarantee policy effectively nullified market exploration and development since producers lacked any incentive to be other than production orientated (Foxall, 1982). Even today, the official attitude allows the farmer to become involved in 'preparation for market' but the farmers' actual involvement with marketing finishes at the gate stage. Some see this as the result of government deference to the food industry but the affect has been to reinforce the view that farmers are producers rather than marketers. So, it can be said that even today government influence over agriculture results in difficulties for producers to make strategic marketing decisions. In the late

1990's due to economic pressures, many farmers were collaborating in a phenomenon called 'farmers markets'. This is yet another example not only of the reluctance of British farmers to join co-operatives, but also the necessity for farmers to work together to improve their financial prospects. Figure 3.2 summaries the historical development of marketing co-operatives in the UK.

FIGURE 3.2

HISTORICAL DEVELOPMENT OF MARKETING CO-OPERATIVES IN THE UK

1890	**BRITISH AGRICULTURAL ORGANISATION SOCIETY TO PROMOTE CO-OPERATION**
1931	**1ST AGRICULTURAL MARKETING ACT LEGAL BASES FOR MARKETING CO-OPERATIVES**
1933	**FORMATION OF THE MILK MARKETING BOARD AND OTHER STATUTORY BOARDSPOTATOES ETC**
1960	**AGRICULTURAL AND HORTICULTURAL ACT**
1967	**CENTRAL COUNCIL FOR AGRICULTURAL AND HORTICULTURAL CO-OPERATION**
1983	**FOOD FROM BRITAIN (formerly the CCAHC)**
1994	**DEMISE OF MILK MARKETING BOARD**
1999	**BRITISH WOOL MARKETING BOARD THE ONLY BODY STILL IN EXISTENCE**

- **MODERN CO-OPERATIVES**

Today, a co-operative organisation is significantly different; in both the way it is formed and managed, from any other form of business enterprise. As Le Vay (1983) suggests the conventional approach to the definition of a co-operative is to list the Rochdale Principles and to assert that any organisation exhibiting the appropriate characteristics is a co-operative. The problem arises that not all organisations that claim to be co-operatives subscribe to all the Principles (Le Vay 1983). Co-operatives are bound within the 'principles' with which they are formed. Though there are some differences between co-operatives, they tend to share the basic co-operative principles. These include: -

1. the enterprise, its management, objectives and the use of its assets shall be controlled by the workforce
2. in any system of voting one man one vote shall apply
3. labour hires capital, capital does not hire labour
4. if the workforce decide to dissolve the enterprise, they shall not benefit financially by doing so

Within specialised naturally coloured wool farming, there is a reluctance by producers to enter into a formal co-operative arrangement. However, there are many benefits for these producers if they could work together to improve their marketing situation. During this research, many objections to joining and participating in co-operative ventures were discovered and these proved to be of a similar nature to previous work. 'Co-operation might seem to flourish in agriculture and to combine the economies of production on a large scale with many of the joys and social gains of small properties. It requires habits of mutual trust and confidence and unfortunately the bravest and the

boldest and therefore the most trustful of the countrymen have always moved to the towns, and agriculturists are a suspicious race' (Marshall, 1891, Book 6 of 9). This attitude would primarily seem to be motivated by a reluctance to lose power over their work; yet one of the frequently asked questions is why do other European countries (notably France, where French farmers are noted for their independence) work together on a secondary level to present a united front to the final consumer. Yet, despite a withdrawal of governmental commitment, this research has identified that some producers are prepared to 'co-operate'. Once the producers have experienced the benefits of this co-operation, this may alter their opinions and foster a new age for co-operatives in Britain (Sargent, 1994, Stewart, 1993, Wright, 1979).

3.4 CO-OPERATIVES FOR MARKET DEVELOPMENT

As mentioned earlier in this chapter, the agricultural dominant orientation is towards production. However, as the Figure 3.3 demonstrates, as value is added within the wool supplychain different marketing concepts are applied.

FIGURE 3.3 TYPES OF MARKETING UNDERTAKEN IN THE SUPPLY CHAIN

Supply Chain Stages	Types of Marketing
FARME → Wool Board	CO-OPERATIVE MARKETING
Wool Board → Manufacturers	AGRICULTURAL MARKETING
Manufacturers → Retail Outlets	INDUSTRIAL MARKETING
Retail Outlets → End User	CONSUMER MARKETING

Figure 3.3, also highlights the very regimented and, seemingly mutually exclusive, division of marketing effort, with added value only being realised after the product has left the primary producer, However, this need not always be the case. For example, within the apple industry, producers have realised that they can increase return on their produce by sorting, labelling and pre-packing the goods themselves. Unfortunately this seems to be a rare example of the producers embracing the marketing approach as all to often the diverse backgrounds and experience of those involved undermines attempts to co-ordinate the application of marketing principles by all parties within the supplychains (Carberry, 1995). Consequently, many producers, produce in a vacuum, with the 'marketing' element only being increasingly applied as value is added through the supplychain to the final consumer.

For most producers the co-operative is seen mainly as a mechanism for relieving them of the troublesome, costly and time consuming activities and freeing the producer to concentrate on production (Gasson, 1977). In fact, it could be argued that this traditional view of the role of co-operatives only serves to reinforce this production orientated mindset. More than just unburdening producers, there needs to be a recognition among producers that co-operative marketing could play a more proactive role.

Paradoxically, however, one of the main barriers to the more widespread application of marketing theory is the dominant position of the British Wool Marketing Board (BWMB), the last government sponsored co-operative marketing board (Barker, 1989). The aim of the BWMB is to pursue strategies designed to improve the long-term incomes of the

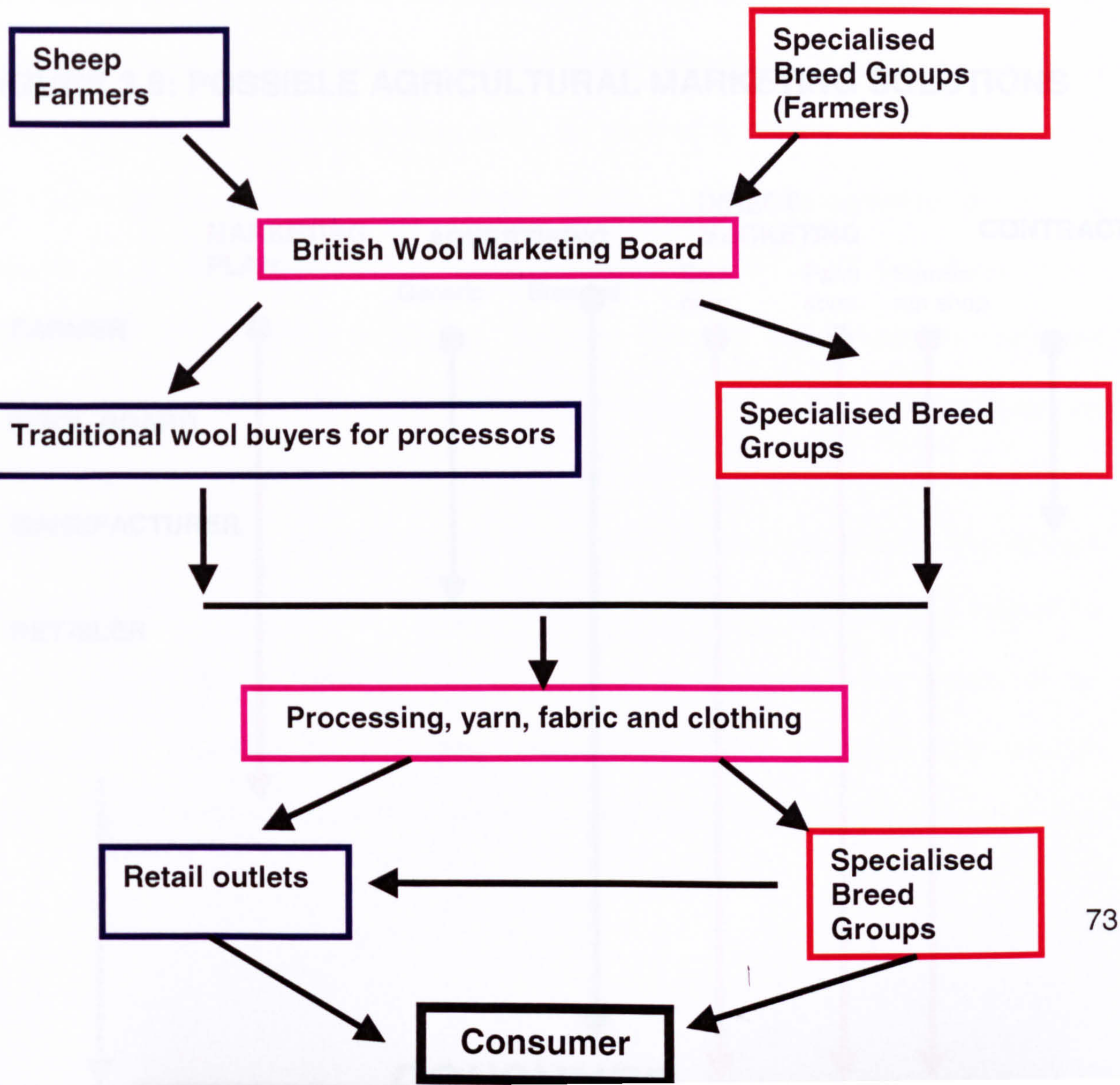
individual producer members by attempting to overcome (through co-operative selling) the inherent weaknesses of the individual within the market place. However, lack of resources and infrastructure ensure that the board assumes the role of little more than a sorting depot whose main function is to regulate the supply of an undifferentiated product. Even this would not be so serious a handicap were it not for the fact that by law wool farmers must sell their produce directly to the BWMB. Thus, there is little room for farmers to by-pass the BWMB and pursue more proactive private co-operative ventures. Nevertheless, despite the legal restrictions there are signs that at least some farmers are prepared to take matters into their own hands. The research has identified that in response to the apparent inadequacies of the marketing efforts of the BWMB, many specialised naturally coloured wool producers are actively creating additional 'groupings/producer breed groups/or unofficial co-operative' movements in order to obtain a share of voice, not only within the marketing board but also directly to the final consumer. Perhaps it will be through these mechanisms as opposed to the BWMB that agricultural marketing will be most able to serve the needs of farmers.

Through co-operatives, it is believed that agricultural marketing could help farmers to produce consistent, larger quantities of high-grade produce. Furthermore, it must also help to raise the sights of producers beyond production orientation. Thus, agricultural marketing should be a key factor in encouraging more 'downstream' activities such as, preparation and packaging as well as sourcing the best channels and methods of disposal (Gasson, 1977). By absorbing more of the value-added activities traditionally

undertaken by other agencies further along the regimented supplychain, farmers could be in a position to secure for themselves a greater financial return (Gasson, 1977)

Most of the academic research previously undertaken principally discusses the original formation of the co-operative and its success or failure factors (Co-operative Development Society, 1995) Figure 3.4 illustrates that this research is looking at an unusual situation, where there are marketing 'groups' either side of the Marketing Board, directly competing against those undertaking industrial and consumer marketing.

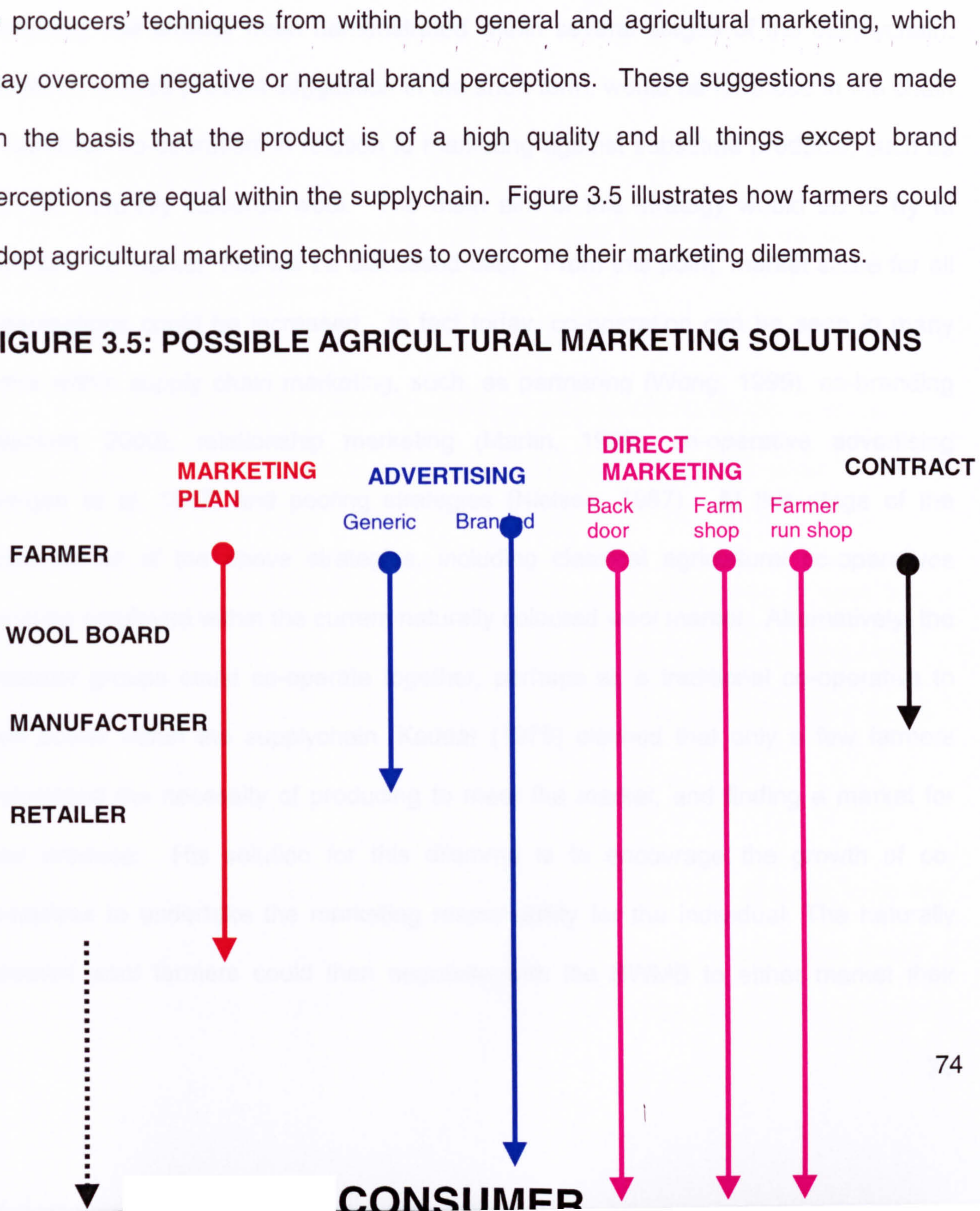
FIGURE 3.4 U.K. WOOL MARKETING SYSTEM



3.5 THE CONTEXTUAL MARKETING FRAMEWORK

This research investigates the brand perceptions for a product that is essentially agricultural in nature. As a consequence of the investigations, it is possible to suggest to producers' techniques from within both general and agricultural marketing, which may overcome negative or neutral brand perceptions. These suggestions are made on the basis that the product is of a high quality and all things except brand perceptions are equal within the supplychain. Figure 3.5 illustrates how farmers could adopt agricultural marketing techniques to overcome their marketing dilemmas.

FIGURE 3.5: POSSIBLE AGRICULTURAL MARKETING SOLUTIONS



- **APPLICATION OF MARKETING PLANNING**

Kohls et al (1997) in common with other academics (Doyle, 1998; Kolter, 1997; Wilson & Gilligan, 1995) suggests that the producer should have a marketing plan in order to strategically plan for the future. The understanding and application of the principles of marketing has already been demonstrated within several stages of the supplychain. However, a more prudent suggestion in the short term, would be for those in the chain to consider 'co-operation' in relation to marketing against substitute products, such as non-UK naturally coloured wool. The main aim of this strategy would be to try to increase the market; this will be discussed later. From this point, market share for all organisations could be increased. In fact today, co-operation can be seen in many forms within supply chain marketing, such, as partnering (Wong, 1999), co-branding (Blackett, 2000), relationship marketing (Martin, 1998), co-operative advertising (Bergan et al, 1997) and pooling strategies (Nielsen, 1987). At this stage of the research, all of the above strategies, including classical agricultural co-operatives could be employed within the current naturally coloured wool market. Alternatively, the producer groups could co-operate together, perhaps as a traditional co-operative to gain power within the supplychain. Kaddar (1975) claimed that only a few farmers understand the necessity of producing to meet the market, and finding a market for their produce. His solution for this dilemma is to encourage the growth of co-operatives to undertake the marketing responsibility for the individual. The naturally coloured wool farmers could then negotiate with the BWMB to either market their

product more or to support the new groups attempt to collaborate further through the supply chain. Other possible strategic solutions include: -

Direct Marketing to the End Consumer

The producer could undertake direct marketing to the consumer bypassing the middlemen and reducing costs (Viaene, 1977). This can be achieved by the following methods: -

- ❖ back door sales
- ❖ farm shops or stalls
- ❖ farmer-run shops where a separate not at the gate enterprise is set up and run completely as a profit centre

However, these suggestions can have several adverse situations for the producer: -

- ❖ The location of the farm needs to be within travelling distance of urban centres of population.
- ❖ The overall detrimental effect on the farm family and staff having to work longer hours and over weekends as well as the fact that they are not trained retail staff
- ❖ The overall effect on the farm business may result in conflicts between the different interested parties

It should also be noted that the market for specialised naturally coloured wool sold directly without processing is extremely limited. With the market mainly consisting of hand spinners, weavers and felt makers or other craft enterprises. This, therefore,

means that specialised naturally coloured wool groups must undertake some of the stages of production in order to have a value-added product for the market. This will involve a significant change in farmer mindset from production orientation to the acceptance of different risks and the undertaking of training in production of wool clothing and retail techniques.

Advertising

When considering promotion of the product there are two types of advertising that can be employed – generic or branded. Generic advertising involves all the separate brands where the 'industry' such as the British Wool Marketing Board concentrates on expanding the total market for product sales. This is sponsored by the producers and/or firms to benefit all within the supplychain. However, small interest groups may feel that this should include branded promotion. In addition to/instead off smaller groups/individuals can promote individual brands either through the supplychain or to the end consumer to stimulate interest in a specific product group.

Kohls et al (1997) has suggested criteria to assist in successful agricultural product promotions:

- ❖ It is important to be able to differentiate the product by brand or region.
- ❖ The more substitutes then the more specific the advertising for example beef instead of all meat.

- ❖ Production and marketing of the product should be in the hands of an organised group of producers to ensure consistency of supply quality especially if the market expands and new entrants come into play.
- ❖ The advertising program must be co-ordinated with other marketing activities. Quite often producers believe that advertising alone is enough!
- ❖ Most successful commodities arrive at the end consumers with little change in identity.

So, a priority must be to ensure product identity, in a process chain where the identity is lost in production. As with other forms of marketing Kohls et al (1997) suggests that advertising not only contributes to the overall market intelligence and information dissemination but this can also assist in the smooth operating of the marketing system. As a result there will be increased customer satisfaction and lower transaction costs between buyers and sellers. One point of concern to consider though is that substitute product areas may also increase their advertising to ensure their market share.

Producers have often viewed advertising and promotion as a solution to their price and income problems (Kohls et al, 1997). However, this is only one area within the vast array of tools that marketing could provide. The main goal for expanding demand is to improve prices and producers' incomes, while at the same time increasing consumption. The economic affect of expanding demand will be that the demand curve will shift to the right so that the same quantity of product can be sold at a higher price. Since the producer is limited to the total production in any one cycle this would

increase income, provided that acknowledgement of the cost of the advertising was considered before profit was calculated. However, increasing the price at the gate, could have a knock on effect resulting in buyers in the chain looking for cheaper substitutes, unless there is something unique about the product.

Contract Production

Producers could enter into a contract production guarantee price scheme (Pickard, 1975). This could reduce the risk of a low market price. This already occurs between supermarkets and food producers. By forming a specialised wool co-operative, farmers could improve their bargaining power in this situation. However, it was due to the fragmented nature of this product and the geographical placement of farmers that the BWMB was originally created to provide this bargaining power. If some arrangement could be made with, processors to agree a guaranteed price for wool this would assist the farmer in the application of strategic marketing. And with a different system of brand identification, it could be possible to identify the product, so that those wishing to buy the product could enter into a contractual agreement.

Collaborative Marketing

Some form of pooling or collaborative venture could be developed either between the naturally coloured wool farmers or BWMB and a specific vertically integrated processor-manufacturer, or a specialised separate processor and manufacturer to create a sample range to be marketed to retailers, designers and the general public. Alternatively, they could attempt a strategy employed by WCM (1998), by forming a partnership with either an innovative fashion designer who uses natural fibres or a

design college to show the benefits of this material to new designers, to provide a higher profile for the possibilities of naturally coloured wool clothing. Such strategies are not only adopted because of expense and risk to the participating firms, but, because it also tries to avoid destructive competition between members in the supply chain (Nielsen, 1987).

However, if the breed groups decide to market directly to consumers then they must understand that 'consumers perceptions can be influenced by the image of the firm behind the product' (Henehan, 1997). Also, because this product would be expensive possibly in comparison to alternatives, there must be some value to the consumer of knowing the source of the product, if the breed group identifier is to be applied. This fact, therefore, suggests that there are two facets of branding to consider, the group providing the wool and the brand under which the product will be sold.

3.6 CHAPTER SUMMARY

Chapter Three has briefly discussed the fusion between agricultural and general marketing in relation to the naturally coloured wool market. It has been noted that although naturally coloured wool is not recognised as an agricultural product, there are several agricultural concepts that must be employed within this market, if agricultural marketing is to fulfil one of its main goals, that is, to raise the sights of the farmer to matters beyond the farm gate.

Due to the high level of investment and the relatively long time to recoup these expenses, naturally coloured wool producers must feel confident that there is a profitable and sustainable market for their products. Co-operative organisations are viewed as the main vehicle through which producers can attain economies of scale and a better market position within the supply chain.

Co-operative organisations and their ideals are an integral factor in the production stage of specialised naturally coloured wool both at the requisite level and specifically at the secondary level – marketing boards. In practice, however, this approach is restricted by the fact that the farmer level is dominated by pedigree sheep breeders who find it difficult to collaborate and who are inherently individualistic.

Finally, a series of possible strategies were suggested making use of the principles of traditional co-operatives such as direct sales, contract production etc., and collaboration such as partnering, co-branding etc., between members in the supply chain.

Keeping the identity of the product provides the producer with the highest return. It would, therefore, be pertinent since the identity is lost during production, to consider how to use this identity as a brand to uniquely market the product not only throughout the supply chain but also to the end consumer.

3.7 REFERENCES

Blackett, T., Russell, N., (2000), Co-branding – science of alliance, *Journal of Brand Management*, vol 7 no 3, pp 161 – 170.

Barker J.W., 1989, *Agricultural Marketing*, 2nd edition, Oxford University Press, New York.

Baron, P., (1978), Why co-operation in agricultural marketing, *Journal of Agricultural Economics,* Vol. XXIX, no.2.

Bateman, D., (1976), Agricultural Marketing: A review of the literature of marketing theory and of selected applications, *Journal of Agricultural Economics*, 27 (2), pp 171 – 226.

Bergen, M., John, G., (1997), Understanding Co-operative Advertising Participation Rates in Conventional Channels, *Journal of Marketing Research,* Vol XXXIV, August, pp 357 – 369.

Borch, F. J., (1957), *The Marketing Philosophy as a Way of Business Life,* Amercian Management Association, No. 99, New York, in Kolter, P., (1997), *Marketing Management: Analysis, Planning, Implementation and Control*, 9th edition, Prentice Hall, New York.

.

Carberry, M., Starkey, M., (1995), Small Businesses can they survive without horizontal marketing organisations in the 1990's, *Marketing Education Group*, Conference Proceedings.

Cole, G.D.H., (1944), *History of co-operation*, Co-operative Union, Manchester.

Co-operative Development Agency, How to set up a Co-operative Business, London.

Doyle, P., (1998), *Marketing Management Strategy*, Prentice Hall, Hemel Hempstead.

Drucker, P., (1973), Management: Tasks, Responsibilities, Practices, Harper Row, New York, in Kolter, P., (1997), *Marketing Management: Analysis, Planning, Implementation and Control*, 9th edition, Prentice Hall, New York.

Foxall G., 1982, *Co-operative Marketing in European Agriculture*, Gower, Aldershot.

Gasson R., 1977, Farmers approach to co-operative marketing, *Journal of Agricultural Economics*, Vol. 28 pt 1, pp 27-37.

Henehan, B., (1997), Marketing Co-operatives' Competitive Advantage, in *American Co-operation: An annual Review of the Year in Co-operatives*, National Council of Farmers Co-operatives, Boston, pp 245 – 247.

Holyoake , I., (1879), *History of Co-operative vol 2,* Fisher, Unwin, London, in Le Vay C., 1983, Agricultural co-operative theory, a review, *Journal of Agricultural Economics*, Vol. 32, pp 71 – 75.

Johson, G., (1997), Pool Marketing Offers Valuable Alternative for Agricultural Producers, in *American Co-operation: An annual Review of the Year in Co-operatives*, National Council of Farmers Co-operatives, Boston, pp 205 – 208.

Jones D; Monieson D, (1990), Early development of the philosophy of marketing thought, *Journal of Marketing*, 54 (1), pp 102 – 113.

Kaddar T., 1975, Selling or marketing agricultural produce? *Third Ami Shachori Memorial Lecture.*

Kohls R. L., Uhl J. N., (1997), *Marketing of Agricultural Products*, 7th ed., Maxwell MacMillian International, New York.

Kolter, P., (1997), *Marketing Management: Analysis, Planning, Implementation and Control*, 9th edition, Prentice Hall, New York.

Lang, M. G., (1997), The Role of User Ownership in Advertising, in *American Co-operation: An annual Review of the Year in Co-operatives*, National Council of Farmers Co-operatives, Boston, pp 248 – 252.

Le Vay C., (1975), *Co-operative theory and farmer's attitudes: a preliminary study*, Department of Agricultural.

Le Vay C., 1983, Agricultural co-operative theory, a review, *Journal of Agricultural Economics*, Vol. 32, pp 71 – 75.

Levitt, T., (1960), Marketing Myopia, Harvard Business Review, July/August, pp 45 – 56, in Kolter, P., (1997), *Marketing Management: Analysis, Planning, Implementation and Control*, 9th edition, Prentice Hall, New York.

Marshall, A., (1890), *Principles of Economics, 8th edition, Macmillan* - Marshall 1891, book 6 of 9,in Le Vay C., 1983, Agricultural co-operative theory, a review, *Journal of Agricultural Economics*, Vol. 32, pp 71 – 75.

Martin, C.L., (1998), Relationship Marketing: a high involvement product attribute approach, *Journal of Product and Brand Management*, Vol. 7, no. 1, pp 6 – 26.

Moss, B.H., (1975), Parisian workers and the origins of Republican Socialism 1830 – 1833, in Merriman J (ed), *1830 in France: New Viewpoints*, Franklin
Watts, London, in Le Vay C., 1983, Agricultural co-operative theory, a review, *Journal of Agricultural Economics*, Vol. 32, pp 71 – 75.

Nielsen, R.P., (1987), The case for co-operative strategies, *McKinsey Quarterly*, Spring, pp 41 – 48.

Pickard, D., (1975), Trade partnership is better than producer control, *Euro Farm Business*, Vol. 4 pt 2 pp 29-32.

Potter, B., (1891), *The co-operative movement in Britain*, Swan Sonnenschein, London, in Le Vay C., 1983, Agricultural co-operative theory, a review, *Journal of Agricultural Economics*, Vol. 32, pp 71 – 75.

Padberg D.I., Ritson C., Albison B. M., (1997) *Agri-Marketing*, CAB International.

Ramaswami, S.N., Srinivasan, S.S., (1998), Analysing the Impact of Promotions on Manufacturer and Retailer Performance: A Framework for Co-operative Promotional Strategy, *Journal of Marketing Channels*, Vol. 6 (3/4), pp 131 – 145

Sargent M. J., 1992, Joint ventures – a way ahead?, *Yearbook of Co-operative Enterprise*, Plunkett Foundation, Oxford, pp 12 – 30.

Sargent M. J., 1994, *The chequered career of UK agricultural co-operation: a continuing story?*, Yearbook of Co-operative Enterprise, Plunkett Foundation, Oxford, pp 153 – 164.

Stewart A. I. T., 1993, Have traditional co-operative structures outlived their usefulness?, *Farm Management*, Vol. 8, pt 6, pp 287 – 291.

Webster, J., (1984), Experiences in a worker's co-operative, *Industrial Participation*, Summer.

Wilson, R.M.S.; Gilligan, C.; Pearson, D., (1995), *Strategic Marketing Management*, Butterworth Heinemann.

World Clothing Manufacturer, (1998), Wool: Brave words hard facts from WONZ, *WCM*, 78/10, pp 22 –23.

Wong, A., (1999), Partnering Through Co-operative Goals in Supply Chain Relationships, *Total Quality Management*, July, Vol. 10 , Issue 4/5, pp 786 – 793.

Wright D., 1979, *Co-operatives and community, The theory and practice of producer co-operatives*, Bedford Square Press, London.

Viaene J.,1977, Towards co-operation and concentration in the sale of agricultural products, *Review of Agriculture*, Vol. 1, pp 94 – 107.

CHAPTER FOUR

4.0 INTRODUCTION

Previous chapters have developed the reader's understanding of the key aspects of the research area. It has been suggested in order to overcome market difficulties; the entire supplychain should co-operate in order to develop the market. However market growth will continue to be hampered by lack of knowledge or interest among consumers in purchasing the product unless a coherent and consistent brand identity is developed (Kapferer, 1997). Many academics (Doyle, 1998; Kapferer, 1997) argue that branding is crucial to the method employed by buyers to differentiate among similar offerings and associate certain attributes with a particular brand (Fill, 1999). It is, therefore, fundamental that an insight into branding is obtained which could assist the supply chain with the creation of a co-operative brand among channel members.

It is widely accepted that national consumer brands assist in the relationship between a manufacturer and the retailer providing significant benefits for both parties (Webster, 2000). However, the literature review also identified a recent further trend within branding research, which focuses upon establishing a brand identity for non consumer products both at the manufacturer and earlier stages of production. The main driving force behind this development is the fact that 'unbranded' companies are beginning to appreciate that branding can act as a source of competitive advantage (Brand Finance, 1999). However, given the fact that each member of the supply chain is relatively weak acting in isolation, it could be argued that for some non-consumer products, the time has come to seriously consider a supply chain wide solution to the naturally coloured wool branding issue.

4.1 THE PRODUCT

Before analysing the constituent elements of a brand, it is necessary to distinguish the role of branding within the marketing mix. As such, there are three concepts, which need to be considered they are: what is a product, what is a brand and what is a successful brand? (Doyle, 1989; De Chernatony et al, 1998). Producers of products or services have at their disposal a range of marketing mix elements which they can adapt to meet the needs and wants of their target market (Kotler, 1996). Branding is traditionally incorporated within the product 'P' of the marketing mix (Brassington, 1997; Kotler, 1996). ' The product is the first source of a brand identity. A brand reveals its plan and displays its uniqueness through products or services which it encompasses' (Kapferer, 1997). Marketing consists of exchange processes of which the product is one half, that is, the offering to the purchaser. This offering encapsulates all the tangible and intangible attributes which the purchaser requires (Brassington, 1997). The nature of the relationship between the product attributes is detailed in Figure 4.1. Fundamentally, the divisions are the core benefit, the actual product including branding aspects and finally the augmented product, which offers additional consumers services and benefits (Kotler, 1996).

Figure 4.1 The Anatomy of a Product

Adapted from Kotler, (1996)

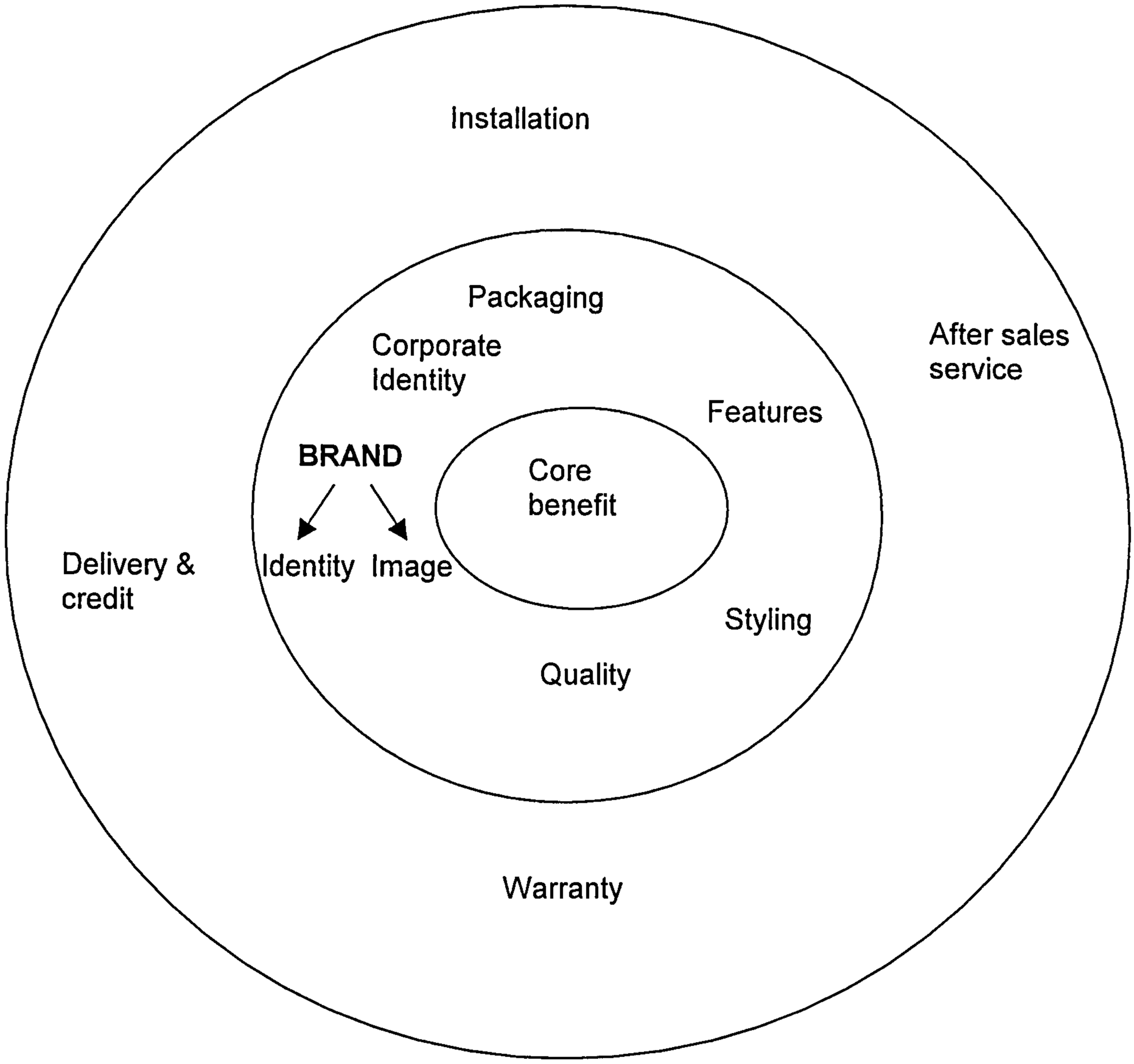


Figure 4.1 illustrates that branding co-operates with all the other aspects of the product in order to form a coherent whole. This whole, when presented to the purchaser offers them an additional reason to purchase that particular product. The significance of this point is that all the product attributes must consistently provide the purchaser with the

benefits they require. If any of these facets do not perform it may affect the potential purchase of the product.

As discussed in Chapter 2, it has been identified that British naturally coloured wool offered for sale, adequately met the BWMB standards for sale and the quality of the breed type characteristics. It would, therefore, be very difficult to improve these standards in the anticipation of improving the purchase price. From the preliminary exploratory research there were conflicting attitudes to, benefits of and images towards naturally coloured wool acknowledged across the supply chain. This was the result of either a lack of knowledge or a good/poor image/perception of naturally coloured wool. Thus, despite the fact that the product is not available within main stream retailing, those questioned all had attitudes to breed identifier brands. This unexpected interest in brands and the undoubted importance of image in connection with naturally coloured wool led to the crystallisation of the research aims around a deeper analysis of the various members' understanding of the naturally coloured wool brand image and their ideas of the image held by consumers of the product. Specifically, it provided the basis for refining the research objectives and influencing the selection of topics to explore further through the literature review.

Brands are perceived as important by buyers in the supplychain and final retail consumers (Webster, 2000; Engel et al 1986; Kotler, 1996). As such brands have become a central issue in product strategy for all parties in the supplychain aimed at differentiating supply (Kapferer, 1997). From a brand owners' point of view one of the

implications of possessing a strong brand is the fact that whoever has the control of the brand can produce/manufacture it anywhere in the world (Kotler, 1996). For these products the divorcement of production and brand identity result in the country of manufacture having no direct perceived influence on consumers and, therefore, economies of scale can be employed for the manufacturer (Kotler, 1996). However, for some brands, the area or country of manufacture is important and this is especially true for the case of British naturally coloured wool. In these cases, the divorcement of production and brand is not an option. Examples of these types of products are Roquefort cheese and Scotch whisky. This approach is sometimes reinforced by law, for example, EU law and the production and brand identification of champagne, also the production of Scotch whisky and Irish whiskey. This combination of brand and 'certificate of origin' are intended to protect a branch of agriculture and products whose quality is intimately linked with a specific place and know -how (Kapferer, 1997).

In both the previous examples, the stronger the brand, the more brand loyalty consumers will have towards it and ultimately the brand owners will become insulated from competitors (Kotler, 1996). In the context of this research chapter 3 identified that a co-operative approach both horizontally and vertically across the supplychain is required. Either of two branding approaches could be employed in this situation. The first would be to pool resources under a single brand, such as Yoplait. The brand would, therefore, achieve uniform production, packaging, communication etc. (Kapferer, 1997). Applying the above mentioned scenario, the size of the company would not affect the possible purchase of the product, so that a small company's product could be enhanced

by such legal indicators of quality on a global marketing stage. This is an important consideration for naturally coloured wool producers, processors and retailers as in most cases the collective size of their organisations are quite small. Alternatively a second approach could be, a collective label (co-brand) could be applied. In this instance, a label such as 'Breed Identifier', British Coloured Wool could be a symbol of a message that partially compensates for the absence of a brand message (Kapferer, 1997).

- Branding, as already stated, allows any company a level of additional competitiveness in the market place where the brand stands for quality and any other aspects the manufacturer requires. Today, even products such as fruit and vegetables are branded – Del Monte pineapples, Granny Smith apples, etc. In contrast, a generic product is unbranded, and as such they tend to be seen as products of lower quality, sold below their branded competitors selling price (Kotler, 1996). Such was the case for milk when it was sold under the milk marketing board. A product seen as a 'generic' brand therefore suffers from poor perceptions from both within the supplychain and final consumers resulting in a lack of profitability. As Doyle (1998) states, 'marketing is about decommoditizing the company's offer. If a company's offer is perceived to be the same as those of competitors, then consumers will be indifferent and will choose the cheapest or most accessible.'

- This last point, has particular relevance to this research. Within the context of naturally coloured wool, the application of the breed identifiers throughout the

supply chain has created an unique branding dilemma. As noted in chapter 2, for some of the wool types under investigation currently the brand identifier (name) is lost during the production process. This identifier is re-instigated at the retail/ consumer interface. For others such as 'Shetland', as the identifier is maintained at the early stages of production. Nevertheless, for Shetland, which has become the generic term for a weight of yarn, a different dilemma has developed. Exploratory research identified that after conversion, the yarn was not necessarily composed from the original wool type. This is because quite often UK Shetland fleece is mixed with foreign imports in order to meet demand. The rationale being if the term 'Shetland' refers to a weight of wool then it does not have to come from Shetland sheep. An adverse affect of this practice is that the original product attributes are diluted, sometimes resulting in the finished yarn and therefore, the final product being of poor quality. This quality implication could then affect the perceptions of those who manufacture, design clothing and purchase/ wear the final product. Clearly, such practices if continued can only serve to undermine any attempt to improve the image of wool.

If a product, such as wool, which is perceived as both generic and branded is to overcome these perceptual issues then one approach suggested by the literature review is the development of a coherent brand identity. For such an approach to be successful in this case, however, it needs to be tackled in an holistic manner encompassing each relationship along the wool supply chain. Thus, it will be necessary to view such relationships as analogous to that between retailer and

consumer. Therefore, within the supply chain a brand identity would have to be developed that would provide a new meaning to each set of 'customers'. Whilst, it has been acknowledged that brands are equally as important for industrial, services and consumer markets (Doyle, 1998), the application of this theory to a whole supply chain has not been attempted before.

A further application of the holistic type of brand theory could be utilised through the development of a collective brand tag such as British Naturally Coloured Wool (Kapferer, 1997). The rationale of the brand tag would be to attempt to improve the image of the sector as a whole. In this way, all coloured wool types would benefit from the creation of a unified, easily identifiable badge of quality.

4.2 HISTORY OF BRANDING

To fully understand the role which brands play in today's marketplace it is necessary to consider their historical development. The historical origins of branding have been well documented (De Chernatony 1989, Interbrand 1990, Hankinson et al, 1993). To summarise, the word 'brand' is derived from the Old Norse word brandr, which means 'to burn'. Brands were and still are used to prove ownership and quality by marking animals, barrels etc. Branding as a concept developed many centuries before the creation of the 'industrial marketplace, which, occurred in the18th/19th centuries'. In fact during the Middle Ages, craftsmen differentiated their goods by stamping their marks on them (De Chernatony & Mc Donald, 1998). As the industrial revolution developed the production of identifiable (branded) goods and the discipline of 'marketing' evolved in order to meet the growing needs and wants of consumers (Lancaster & Massingham, 1993).

Branding in its current form evolved during the second half of the 20th century; Kodak and Coca-Cola are examples of products that have been successfully managed over the past 100 years. Many products owe their origins to the explosion of economic activity which resulted from the new, fast and efficient communications systems brought about by railways and steam driven ships, during the Industrial Revolution (Interbrand, 1990).

The following points summarise now branding has developed since its first conception within marketing: -

1. Legal systems have recognised the value of brands to both producers and

consumers, against such difficulties as forgery (Cohen D, 1986). Only a hundred years ago manufacturers felt it necessary to make pack designs as complex as bank notes to avoid forgery (De Chernatony et al, 1988).

2. The concept of branded goods has been extended to embrace services (Palmer, 1995)

3. Branded goods are distinguished by tangible and now intangible factors (De Chernatony et al,1988; Biel, 1992; Interbrand, 1990; Murphy, 1988)

Today, the main role of a brand is to provide a consistent way of communicating a company's own culture and brand values to its customers. Over time, the buyer has also learned to expect that the product will be consistent in quality and that the brand promise will be replicated or reinforced on each purchase (Feldwick et al, 1995). In order to achieve this, an holistic approach must be taken by the whole organisation, in order to 'live the brand' (Mitchell,1994). In fact the management of the brand needs to be carefully managed within a framework of keeping the larger promise of the brand, while at the same time ensuring that the brand's strength is not separated from the product or service delivery (Feldwick et al, 1995). For a brand to be successful in terms of market share or recall, it not only requires a reasonable product and promotion but also being 'nurtured by a business person with a consistent vision. The brand also requires long term corporate commitment with the vision and the creative passion to distinguish product and market position' (MaCrae, 1991). It is also seen as an

opportunity for relationships to be developed between the various parties within the exchange process. In fact, the brand is seen as being a three dimensional entity, which is endowed with having all the senses and as a provider of experiences for the customer (Mitchell, 1994). Importantly, the brand owner should remember that a brand is a symbolic language, which provides another set of codes on to which inevitably consumers project their own meanings (Feldwick et al, 1995).

4.3 DEFINITIONS OF BRANDING

There is a wide body of literature available that explores the many facets within the definition of branding (Patterson, 1999; De Chernatony et al, 1988; Kotler, 1996; Hankinson et al, 1993). The most commonly accepted definition states that 'a brand is a name, term, symbol or design, or a combination of them that is intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors' (AMAC, 1960). However, as Laforet (1993) suggests, branding is infact 'dynamic'. This is reflected in the work which is still being undertaken to try and define branding terminology (Patterson, 1999; De Chernatony et al, 1988) and brand typologies (De Chernatony 1989).

- A view generally held (De Chernatony et al, 1998; Haigh, 1996; Palmer, 1995; King, 1984) is that a brand is not only the identifier for a product (a tangible entity) but also something much more (intangible elements). As King (1984) stated 'brands .... offer consumers added values that are communicated through advertising. These added values could be rational, functional issues, such as a consistently high quality level, and/or emotional elements'. In fact, there are streams of branding academic research on how a brand can be defined. Some suggest that a brand is a: (1) blend of the manufacturer's input with consumer's output where the concept is expressed as images, personalities, relationships and as adding value (De Chernatony, 1998), or (2) the brand could be considered to be a company (Aaker 1996) and (3) individual products are an extension of corporate

identity (Diefenback 1992). The (4) deconstructionist view suggests that the brand is an identity system where the brand is considered to be holistic (Kapferer, 1997). (5) Others believe that brand concepts are a serious of associations in the minds of consumers (Arnold, 1992; pitcher, 1985; Joyce, 1963; Martineau, 1959; Newman, 1957). As Keeble (1991) stated, 'a brand becomes a brand as soon as it comes in contact with a consumer'. Alternatively, the brand is seen as a relationship by the consumer (Blackston 1992; Kapferer, 1997; Woodward, 1991). Finally (6) Goodyear 1996, has suggested that brands evolve from 'unbranded commodities', to brands as 'references'. Subsequently, brands develop a 'personality' offering emotional appeals in addition to functional benefits.

- De Chernatony's (1993) findings in a study of how 'experts' define branding 'suggest that the way consumers explain brands could be summarised by a hierarchical model, at its base level many spoke about consumers being likely to describe brands in physical, visual terms. With a little probing the next level would be exposed the symbols giving rise to 'expectations of service satisfaction' then the 'tangible benefits' and with more probing the higher level of associations may then be exposed, if the brand has a clear set of values'.

- It is obvious from the above discussion that differing brand definitions should not be considered as conflicting, but rather they should be seen as expressing differing stages of evolution. With the collective academic view being the acceptance that all of these individual views show the development of brands along a brand continuum. This holistic stance has been embodied within this research in

understanding branding throughout the supplychain.

- **SUPPLYCHAIN BRANDING DEFINITIONS**

To date, the majority of both branding literature and research has tended to concentrate on the manufacturer - consumer (Norris, 1992, Park et al, 1986), or retailer - consumer (Reid 1995, Keller 1993) paradigm. While Doyle (1999), states that brands are not just a feature of consumer markets, they are equally central in industrial markets. In order for this research to be bounded so that understanding can be developed within the supplychain, the current academic thinking of branding category types has been adopted. These categories are commodity/primary producer brands, manufacturer brands and distributor/retailer brands.

As previously stated brand, terminology is expanding (De Chernatony et al, 1998; Laforet 1993). De Chernatony (1988) applying Schuttle's (1969) methodology of brand terminology creation, has developed definitions for manufacturer's brands and distributor's brands, but has not considered commodity/producer brands. This is an important landmark in brand terminology development as it acknowledges that branding (Saunders & Watt, 1979, Lehmann & O'Shaughessy, 1974) takes place throughout the supplychain. De Chernatony & McWilliams (1988) suggests that 'manufacturer brands are added value entities conceived and primarily developed by a manufacturer for a specific group of customers and consumers, which portrays a unique, relevant and distinctive personality through the support of product

development, promotional activity and an appropriate pricing and distribution strategy'. On the other hand, distributor brands are 'added value entities, produced by or on behalf of a distributor following the distributor's specifications. They are targeted at specific consumers and portray an unique, relevant and distinctive personality, which is clearly associated with the distributor and is backed by a coherent use of marketing resources'.

- The final boundary was that of commodity/primary producer. However, the literature review did not reveal a defintion for this. An understanding of this construct and the creation of a commodity/primary producer brand definition, was necessary in order to continue the research. A definition was generated by applying Schuttle's (1969) methodology and considering the above definitions, for commodity/primary producer brands. Therefore, for the purpose of this research a commodity/primary producer brand is defined as:

- *an unique entity, created or developed by the primary producer through product development, which is targeted at specific consumers applying marketing strategies as appropriate.*

Sinclair (1988) supports the creation of a commodity brand when he stated that 'A brand should infer something of a product's worth while facilitating trade and promoting efficiency in the market'. While Biel (1992) stated that 'the concept of brands is somewhat easier to understand and accept in categories where the product is complex and multifaceted. However, successful brands have frequently been developed in commodity-like categories, such as mineral water and ice'.

4.4 ANATOMY OF BRANDING

Academics have tended to divide the area of branding into constituent parts, due to the immense and complex nature of this theoretical area. This research does not attempt to discuss or apply all of these concepts to naturally coloured wool. Although a brief discussion of the main building blocks will assist in explaining the conceptual thinking applied in this research.

Previously, in Figure 4.1, the positioning of branding within the context of a product was identified. The next question to consider is 'What is a brand?' Doyle (1998) has identified that a successful brand consists of four separate and related parts. These are (1) the tangible product, (2) basic brand, (3) augmented brand and (4) the potential brand. Therefore, for a brand to be successful it must reach it full 'potential' (Doyle, 1998).

When brands reach their full potential they have similar characteristics (Doyle, 1998). These characteristics from the company's point of view include: providing a quality product, being first into key markets, identifying an unique positioning concept, while continuing to provide a strong communications programme and finally over time retaining a consistency in message. However, consumers view a brand in levels of meaning, of which six have been identified (Kotler, 1997):

- Attributes, where the brand brings to the mind of the consumer product attributes.

Benefits, these are the functional and emotional benefits, which a consumer purchase when they buy the product.

- Values, this is where the brand says something about the buyers' values.
- Culture, the brand may represent a culture such as Scotch whisky.
- Personality, where the brand is said to actually project a personality.
- Image, where consumers will buy into this personality if the brand's image matches the consumer's actual or desired self-image.
- User, as the brand suggests the kind of consumer who would buy or use the product.

In order for a brand to have a coherent whole, all of the above meanings must be planned, co-ordinated and implemented. This can only be achieved through a deeper understanding of the brand. In order for a brand to be enduring and successful, it is necessary it develops a deep set of meanings, so that all six meanings are understood and acted upon by the purchaser (Kotler, 1997). The brand meanings which create the brand essence are its values, culture and personality (Kotler, 1997). Although Kotler (1997) has identified these six meanings of a brand, most academics have researched branding by analysing two elements at a time. For example, positioning/personality (Hankinson et al, 1993), awareness/image (Keller 1993), functional/emotional (De Chernatony et al, 1988), while Park et al (1986) divide the 'brand' into three - functional, symbolic and experiential. The research detailed above tends to suggest that the theoretical discussion of branding is not as discrete and the interaction between meanings is perhaps more complex than Kotler (1997) stated. As

can be seen from the previous discussion, branding as an academic topic is immense. Due to the holistic total supply chain approach taken in this research, it was, therefore, necessary to focus on key aspects for naturally coloured wool.

The decision to undertake research into the area of brand image was as a result of findings from the exploratory research, following the principles of grounded theory (Strauss et al, 1998). Findings from the preliminary fieldwork identified inconsistent views of brand perceptions and actual knowledge of naturally coloured wool. Furthermore, practitioners within the supply chain strongly expressed the opinion that one of the main inhibitors for the product was a poor general image of naturally coloured wool. This, therefore, lead the literature review to consider specifically aspects of brand image.

There has been some semantic confusion however in differentiating personality and image (Patterson, 1999; Plummer, 1985). Plummer (1985) suggests that brand image is the way consumers perceive brand personality. While brand personality is primarily the result of a firms communication to its publics.

Brand image is an encapsulating concept and as such has a number of inherent characteristics or dimensions (Restall et al, 1993) which include among other things, personality and user image (Patterson, 1999). However, a new concept in branding has been identified, namely, brand identity (Kapferer, 1997), which incorporates Biel's (1992) personality and image concepts.

Figure 4.2 Differences between Brand Identity, Image and Personality

(Kapferer, 1997)

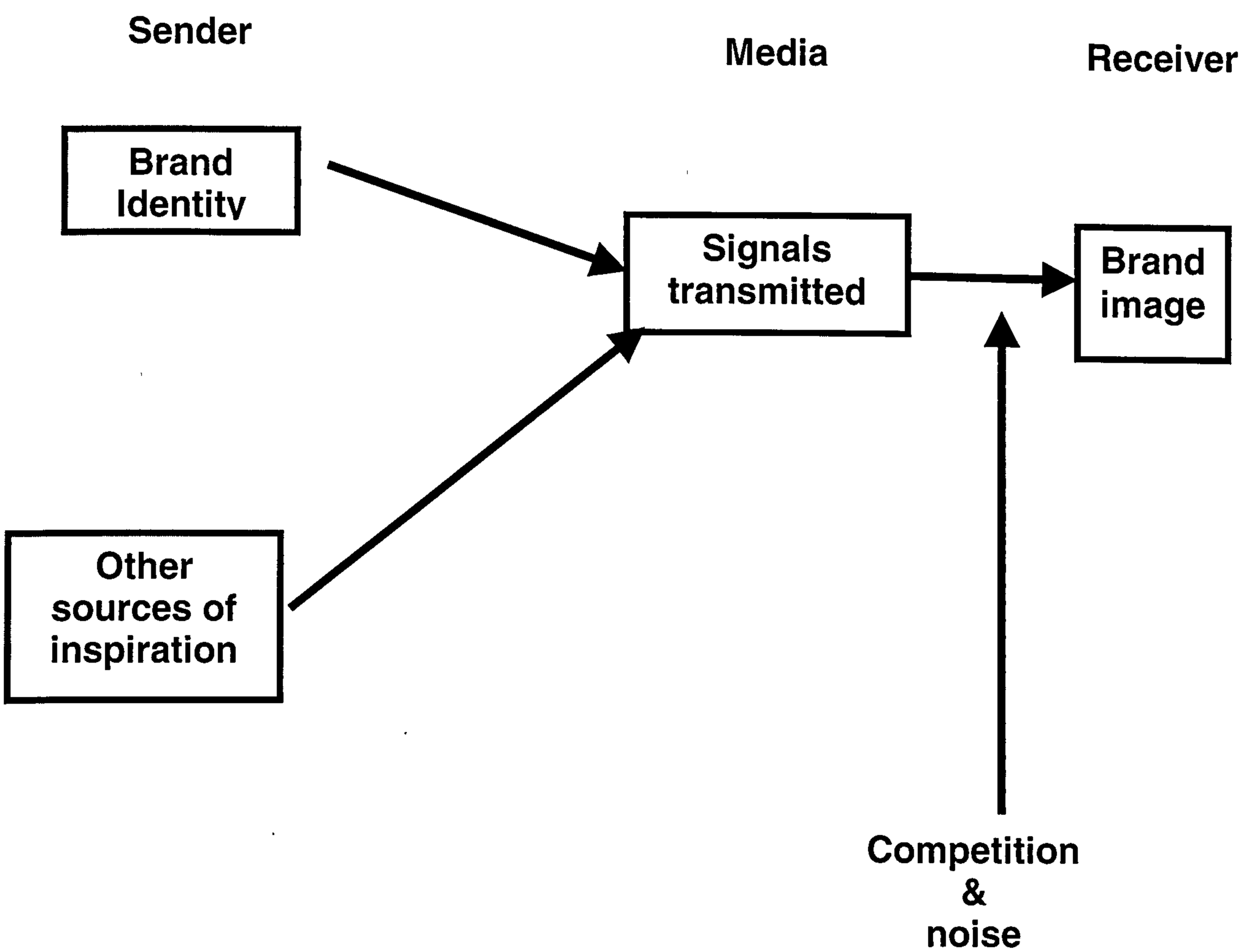


Figure 4.2 illustrates Kapferer's (1997) concept of the difference between identity, image and personality. With brand identity, it is the sender's duty to specify the meaning, intention and vocation of the brand. While the brand image results from a decoding and extracting of the meaning and interpretation of the signals (Kapferer, 1997). This concept has been generally supported by others. Hankinson (1993) for example states that, a brand image refers to how the target market perceives the brand. The brand personality refers to the unique combination of functional attributes and symbolic values. While a brand identity is the message sent out by the brand through it product form, name, visual signs etc.

Since the strength of brand image is associated with the consumer perceived value of the brand, it is important that the brand names and logos not only identify and differentiate the product, but also accurately portray a desired image (Safavi, 1996). This is why previous research has mainly concentrated on the development of brand names (De Chernatony et al, 1998; Shipley 1988; Murphy 1988), brands over lifecycles (De Chernatony 1993, Park et al 1986), rejuvenating brands (De Chernatony et al, 1992), trademarking (Cohen, 1986), labelling (Lutz, 1993) and 'sloganeering' (Farhi, 1993, Mathur,1995).

'Brand image' can be defined as 'a perception created by marketers' for the management of the brand (Parker al 1986) and as Biel (1991,1992) stated 'it is the associations linked to brands, that cluster of attributes and associations that consumers connect to the brand name'. Whereas, Joyce (1963) views brand image

somewhat differently it is the 'set of associations which (it, the brand) has acquired for an individual'. Patterson's (1999) recent research has resulted in the most substantive definitions for brand image to date. He suggests that a 'brand image is a set of consumer perceptions of brand attributes and associations from which those consumers derive symbolic value'. A brand, therefore, has three images (Biel 1992), 'the image of the provider of the product/service, or corporate image; the image of the user; and the image of the product/service itself', which must all be understood and taken into consideration when developing a brand strategy. Furthermore, Safavi (1996) supports this view with Biel (1992) that a brand image is a function of product image, corporate image and user image which are the three building blocks of brand image, where the user image is most significant, corporate image becomes a major variable when consumers' trust in the suppliers credibility to consistently offer a quality product is at stake while the product class is mostly responsible for the product image. In fact, brand image is a simplified perception of a complex reality (Safavi, 1996). It could be said that the above views suggest that brands are systems particularly since the components of brand image are so closely related. As Patterson (1999) states 'The brand image system is, therefore, tentatively conceptualised as an integrated system incorporating: product/service/organisation image; sensory expression; heritage/contemporariness; occasion image; user image; personality and salience viewed from the consumer's perspective'.

This deeper understanding of brand image therefore assists an investigation into the current customers' brand image of a product so that strategies can be developed as

required. De Chernatony (1989) has also conducted marketing research into brand image, which supports the findings of Keller (1993) and Biel (1991,1992). As De Chernatony (1993) states 'the importance of brand image is 'when two competing brands are perceived as being equally similar in terms of their physical capabilities, the brand that comes closest to enhancing the consumer's self-concept will be chosen (image)'. The above discussion illustrates for the most part, that although conceptual research has been undertaken within the different aspects of brand image and there is little literature evidence of any empirical work in this area.

Most academics have been content to provide brand managers with a set of prescriptive criteria for the successful development of a brand from its inception to final launch. For example, Park et al's (1986) model is designed to provide marketing management with the strategic framework on which to base consistent branding decisions, 'a brand concept should be viewed as a long-term investment developed and nurtured to achieve long-run competitive advantage' (Park et al, 1986). While King (1991) notes that the brand must be established as a coherent and consistent entity. Few authors have attempted the complex task of exploring the contextual framework in which brands operate. Indeed, for those few who have attempted to view brands within this larger context most have limited their research to the subject of brand equity. By identifying different elements of brand image, they attempted to form a coherent whole. These contextual models, however, are limited to specific product categories and mostly applied to consumer markets. Thus, the literature review has identified that there has been no investigation to date, concerning branding across a complete supply chain.

4.5 DEVELOPMENT OF THE SUPPLY CHAIN BRAND IMAGE MODEL

Combining the information gathered in chapters 2 and 3 with the previous literature review it was possible to commence the development of a supply chain brand image model. This conceptual model could then be validated during the empirical research. This research as such is a precursor to efforts targeted at positively influencing the consumer image of naturally coloured wool (Bimler, 1999). In this case, an understanding of the brands image in the minds of its publics must be ascertained before any course of action such as the creation of co-brands could be made.

As previously stated, the focus of this research is to develop an holistic systems view of a co-operative brand across the supplychain. After extensive literature research the area of brand equity was chosen to form the bases of the contextual model, because brand equity is driven by brand image (Biel, 1992).

Brand equity supports two functions. The first is the brand valuation expressed in economic or financial terms, (Keller, 1993; Biel, 1992). This function of brand equity is not relevant to this research and will not be discussed further. Of more relevance, however, is the second function, which is to assist management in the strategic formulation to improve market productivity (Keller, 1993). This is achieved by dissecting the elements, which form brand equity for closer investigation. Brand image is a major constituent of all brand equity models and this, therefore, provides several learned opinions on the actual composition of brand image. As Keller (1993) states, 'brand

image is the most valuable asset in understanding the knowledge created in a consumer's mind about a particular brand'.

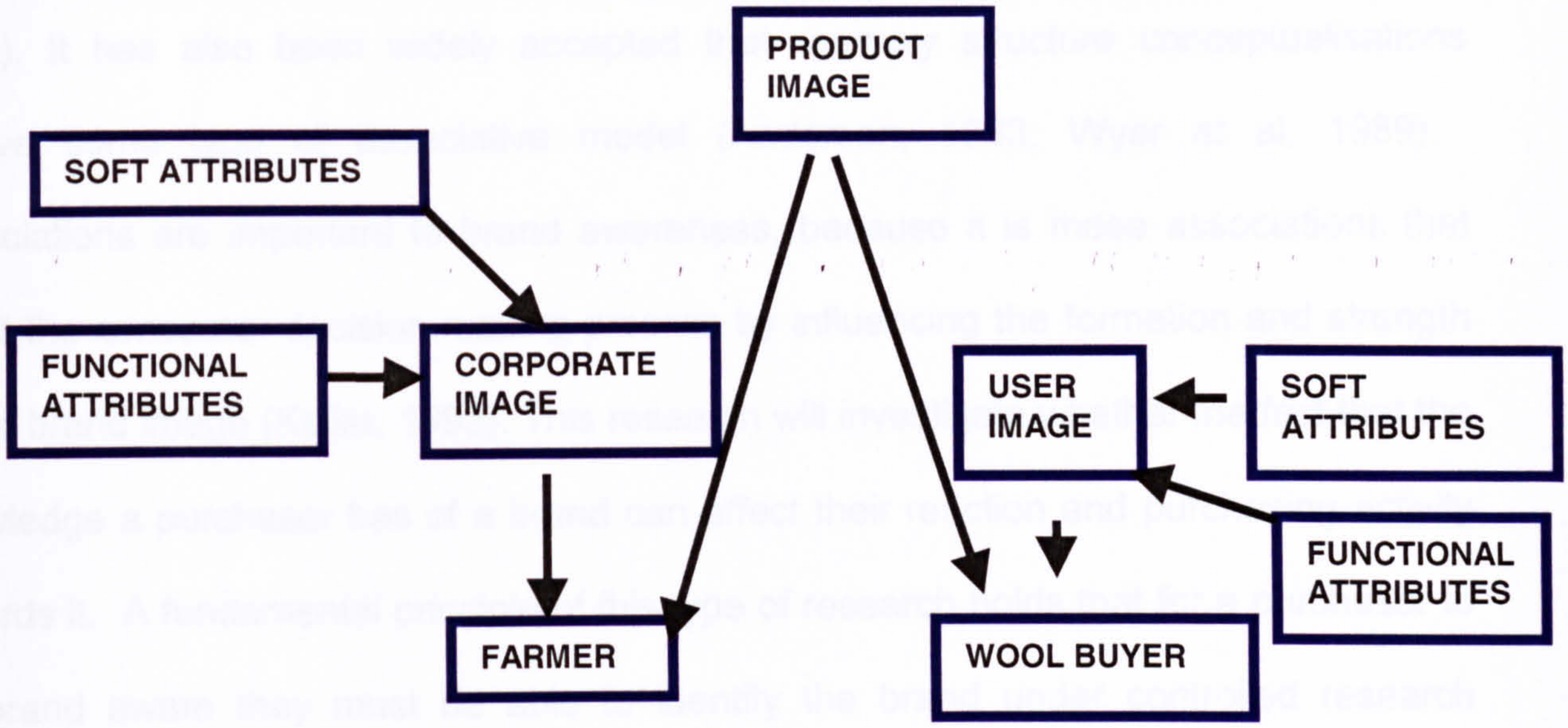
Marketers should understand the effect of their marketing activities on consumer brand knowledge and that long-term success of the brand is effected by short-term marketing efforts. De Chernatony (1998) supports and furthers the above discussion by stating that 'the brand exists mainly by virtue of a continuous process whereby the values and expectations imbued in the brand object are set and enacted by the firm's staff and interpreted or redefined by the consumers'. Therefore, a brand image systems approach (Patterson, 1999) can provide a deeper understanding of the naturally coloured wool supply chain.

Brand image knowledge has been expanded by such authors as Biel (1992) and Keller (1993). In Biel's (1992) "personal brandscape", a theory is proposed to model brand image. This model provides the reader with an understanding of the three components composing brand image and the associations, in a visual metaphor format (King, 1991) which drive brand equity. Whilst this provides an understanding of brand image, the model does not directly take into consideration the intrinsic and extrinsic factors which other authors considered important (Zeithami, 1988; Dodds et al, 1991; Richardson et al, 1994). Keller (1993) also provides a model for mapping the various dimensions of the brand; from initial division into brand awareness and brand image, an associative memory model chart explores aspects of brand perception including intrinsic and extrinsic factors (not called such) as it is owned by the individual consumer.

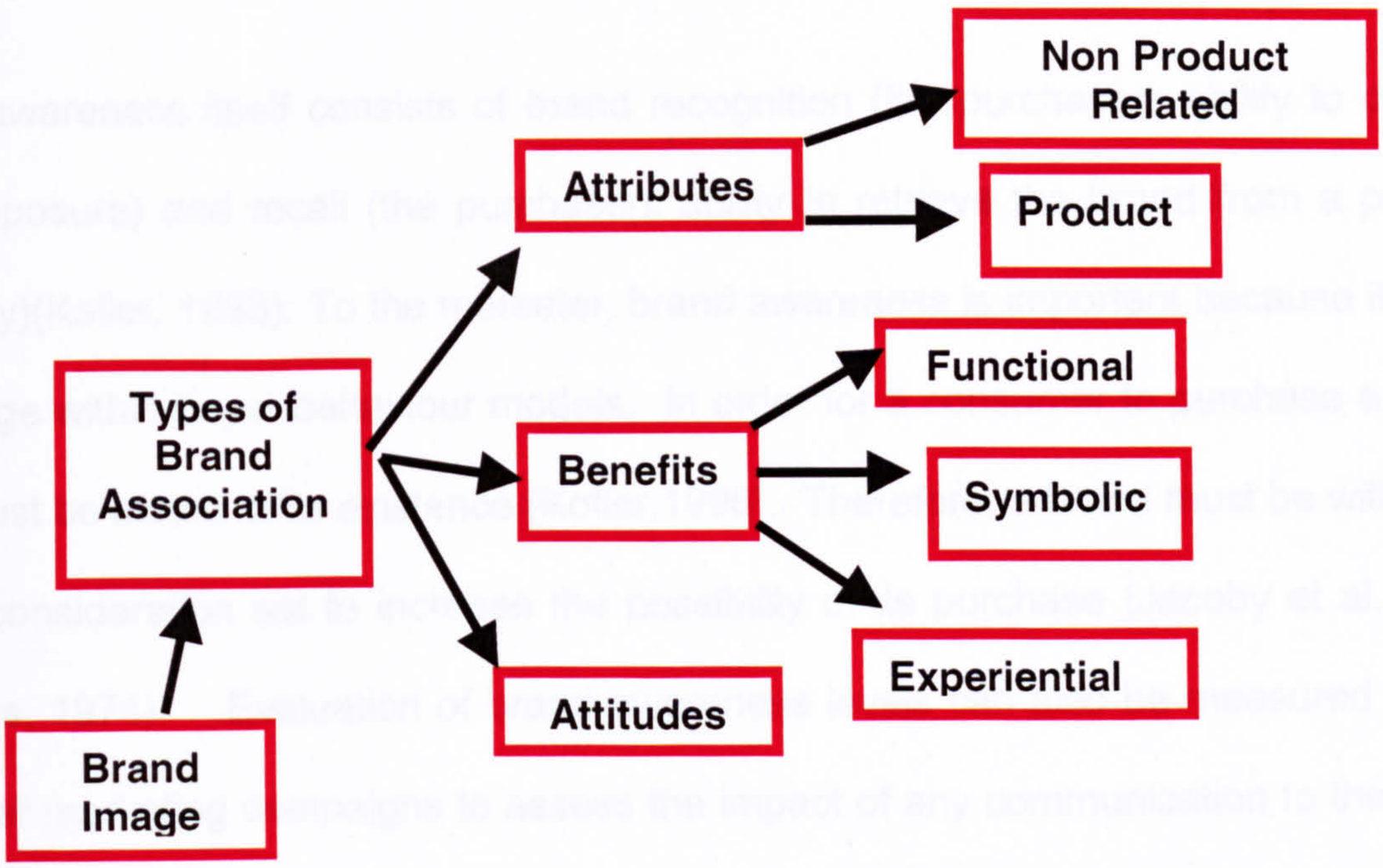
The main limitations of the above models in light of this research is that they do not take into consideration external factors and they mostly consider the consumer end of the supplychain. However, there are several themes and elements from these models, which can be developed in order to create a supplychain brand identity model when combined with a systems methodology (Harrington et al, 1999). Causality is an integral element when applying systems methodology. This research argues that all factors (perceptions) not only affect brand identity but also should be considered when making strategic brand decisions. For example, if farmers perceive that consumers have a poor opinion of their product, they may consider this is a problem for someone else in the supplychain. However, with good market research and an understanding of whether the brand identified needs to be improved or maintained the farmer could add value to the entire supplychain. Figure 4.3 depicts the areas of both Biel's (1992) and Keller's (1993) models that are of particular interest to this research. Kellers (1993) model provides an understanding of how the brand associations form to create a brand image. When these associations are combined with the wool textile supply system and current branding theory a deeper understanding of the overlaps, interconnections and theoretical implications can be seen for this product, see Figure 4.5, which will be discussed later. The section adapted from Biel's (1992) model on the other hand illustrates that there are three main components of a brand image. The collection of 'soft' data is a fundamental aspect of systems methodology and in this case assists in the understanding of the image of naturally coloured wool as it passes through the supply chain.

Figure 4.3 Models Applied To This Research

Adapted from Biel (1992) & Keller (1993)



Biel, 1992



Keller, 1993

- **MEMORY AND IT'S ROLE IN BRAND IMAGE**

A significant amount of research has been undertaken to understand the basic memory principles and the importance of knowledge to consumer decision-making (Alba et al, 1985). It has also been widely accepted that memory structure conceptualisations involve some type of associative model (Anderson, 1983; Wyer et al, 1989). Associations are important to brand awareness, because it is these associations that affect the consumer decision making process by influencing the formation and strength of the brand image (Keller, 1993). This research will investigate whether the fact that the knowledge a purchaser has of a brand can affect their reaction and purchasing activity towards it. A fundamental principle of this type of research holds that for a purchaser to be brand aware they must be able to identify the brand under controlled research conditions (Rossiter et al, 1987).

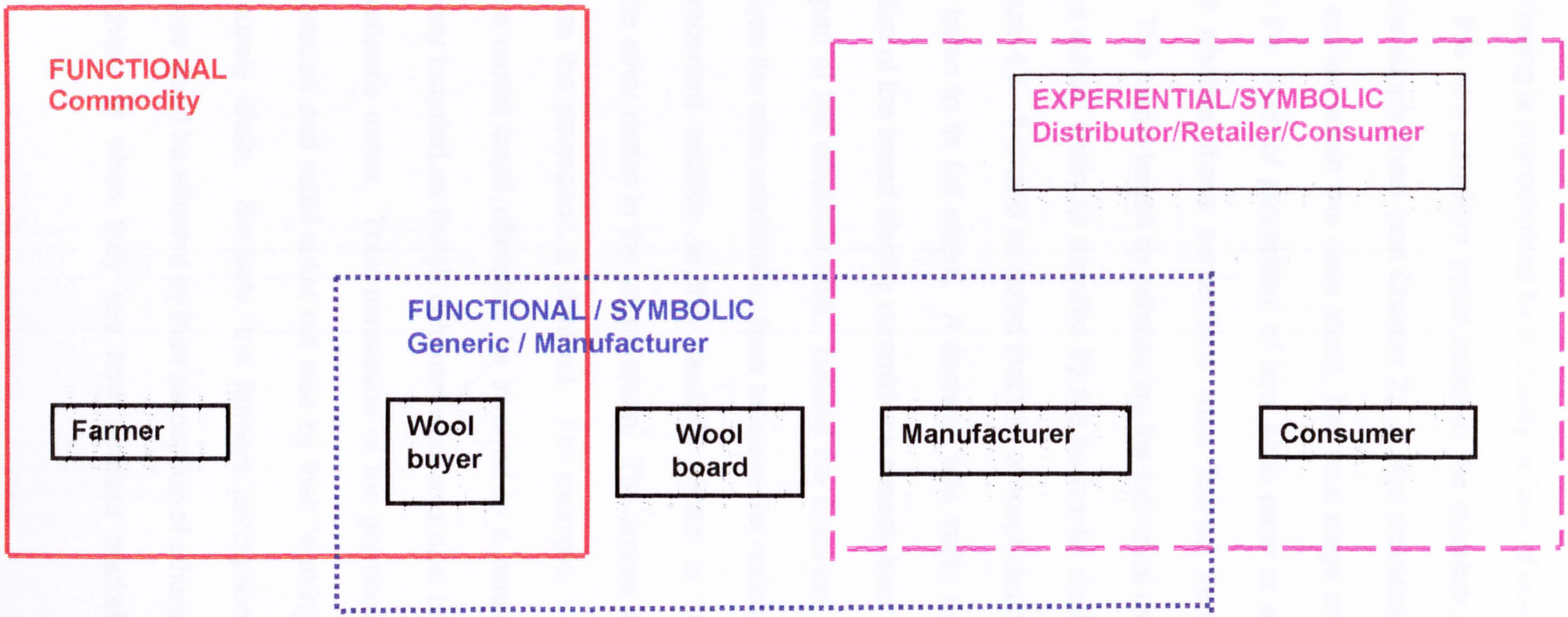
Brand awareness itself consists of brand recognition (the purchasers ability to confirm prior exposure) and recall (the purchasers ability to retrieve the brand from a product category)(Keller, 1993). To the marketer, brand awareness is important because it is the first stage within buyer behaviour models. In order for a consumer to purchase a brand they must be aware of its existence (Kotler,1996). Therefore, a brand must be within the brand consideration set to increase the possibility of its purchase (Jacoby et al, 1977; Roselius, 1971). Evaluation of brand awareness levels can also be measured before and after marketing campaigns to assess the impact of any communication to the target market.

The above points coupled with the exploratory findings and the literature review assisted in the formation of the theoretical base for the first stage of the brand identity model. However, in order to cope with the unique demands of a total supply chain approach, other elements of marketing theory also need to be explored and utilised.

- **THE ROLE OF RELATIONSHIP MARKETING**

Relationship marketing is perceived to represent a genuine focus-shift by which marketers move away from transactional exchange and concentrate on building value-laden relationships with their exchange partners (Kolter, 1997; Peterson, 1995). Previous discussions have inherently considered the entire supply chain. Due to the nature of the product, exploratory research identified that within this supply chain a form of 'relationship' marketing was already taking place. Although it is fair to say that this relationship did not continue consistently throughout the chain and was in fact in two, separate halves. The split in the forms of relationship marketing can be seen in Figure 4.4, as the mid point where the manufacturer crosses the functional symbolic and experiential symbolic brand attitude dyad. Those involved in the generation and processing of yarn/cloth work closely together but in a co-operative nature, while, those dealing with manufacturing of clothing and retail outlets generally are involved in formal market relationships. This top level of the model provides brand management an opportunity to consider how these different brand attitudes could be adapted for use in the creation of their brand's identities.

FIGURE 4.4 SUGGESTED BRANDING AREAS WITHIN THE BRAND COMMODITY IMAGE SUPERMODEL



Relationship marketing is characterised by mutuality, a form of co-operative orientation (Fuanl li, 2000), this new paradigm could assist in the development of collaborative working across the supply chain (see Chapter 2). It also provides strategic principles, which could be applied within this case study. The next stage of the model creation was to consider the 'lines of perception' of how each party or node interacted with each other and whether these perceptions were formed from one or two way communication. The model began by considering the individual relationships between each node in the supply chain as denoted by the horizontal dashed line and all the solid lines in Figure 4.5. It should be noted that this concept could involve every party within the node taken to its full extent. A decision was made that as the principles behind the creation of the brand identity pyramid are already tried and tested, that this would not form part of this empirical work. Instead the empirical investigation was to identify and analyse the main relationship lines between the nodes in the supply chain. However, an important addition to this causality model is the inclusion of the perceptions of the other nodes in the supply chain. The arrows in Figure 4.5 denote the party of whom the perception is obtained. For example, it is possible that all purchasers in the model could ultimately be involved in a consumer purchase if a garment collectively branded as British coloured wool and dual branding as Shetland with the manufacturer's name. Their perception of the garment would not only be affected by the product and retail outlet but also by their 'working' experience of the product in the supply chain. Similarly, the farmers perception of their wool and production practices could be affected by their perception of others views in their direct working relationships, or when they see how retailers market the final product.

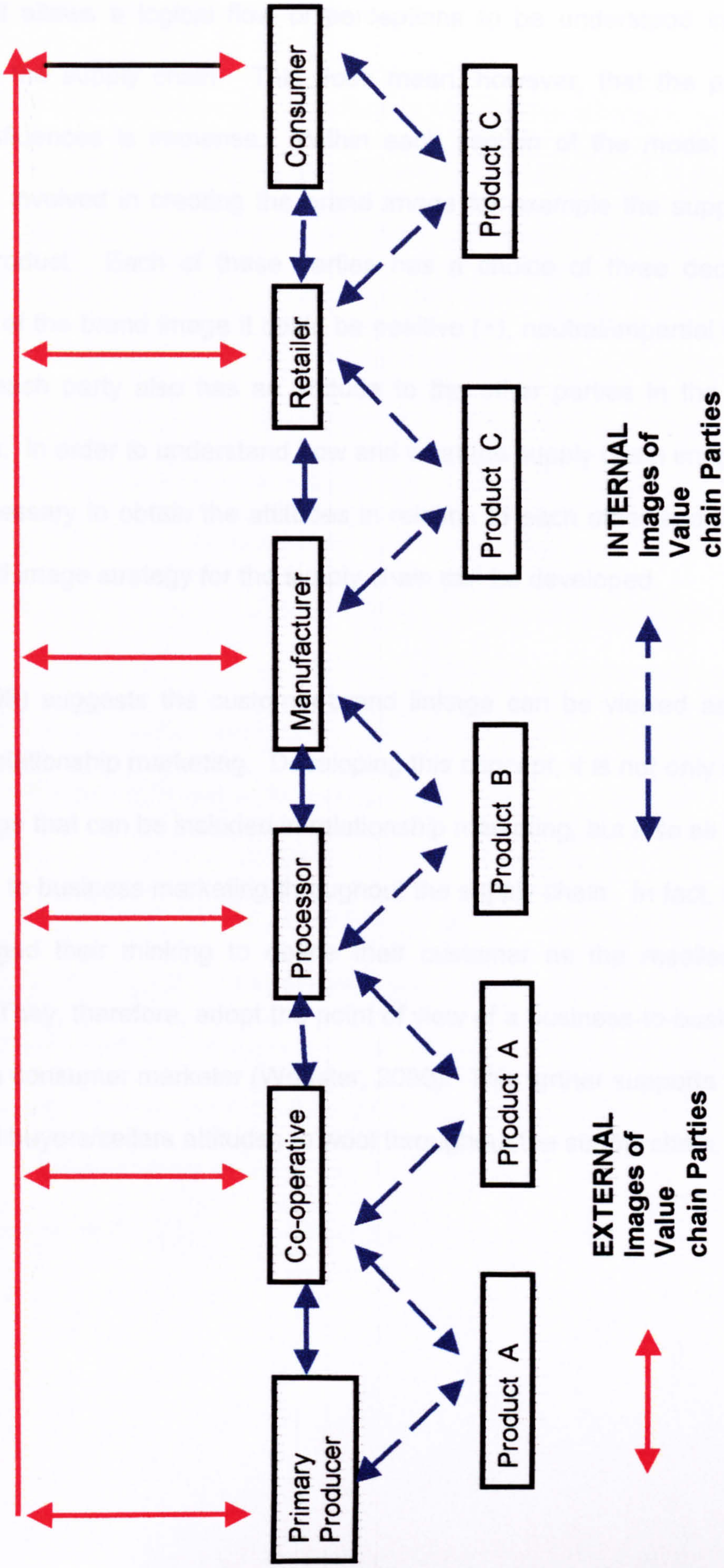


FIGURE 4.5 HOLISTIC VIEW OF THE TEXTILE SUPPLY CHAIN

This model allows a logical flow of perceptions to be understood in any direction throughout the supply chain. This does mean, however, that the permutations of possible influences is immense. Within each section of the model at least three parties are involved in creating the brand image for example the supplier, the buyer and the product. Each of these parties has a choice of three decisions of their perception of the brand image it could be positive (+), neutral/impartial (=) or negative (-). Also each party also has an attitude to the other parties in the model and to themselves. In order to understand how and what the supply chain image of a product is, it is necessary to obtain the attitudes in relation to each other and the product, so that a brand image strategy for the supply chain can be developed.

Martin (1998) suggests the customer-brand linkage can be viewed as an important subset of relationship marketing. Developing this concept, it is not only the consumer-brand linkage that can be included in relationship marketing, but also all those involved in business to business marketing throughout the supply chain. In fact, manufacturers have changed their thinking to define their customer as the reseller not the end consumer. They, therefore, adopt the point of view of a business-to-business marketer as well as a consumer marketer (Webster, 2000). This further supports the concept of including all buyers/sellers attitudes to wool throughout the supply chain.

- **THE BRAND IDENTITY HEXAGON**

Little's (1975) 'brandaid' model provides a marketing strategy approach to the development of a brand. This model has been conceptualised as a modular series for which each sub model provides a more detailed analysis of that section. This approach, which is grounded in systems methodology, has been applied to this research. The methodological premise on which this empirical research is founded is the holistic marketing systems approach to brand identity. This conceptual model is, therefore, not restricted to a particular point in the supplychain. In fact, it considers the development of brand identity from raw material production to the end consumer. The theoretical underpinnings of the model are grounded in the view that brand identity is composed of brand personality, brand image and a combination of corporate and user relationship image. From these relationships, the brand identity is created. Figure 4.5 illustrates those involved in the coding and de-coding of the brand image as wool travels through the supply chain. The dashed line denotes that, although outside influences do have an effect, it is primarily those parties at each stage of the supply chain that generates the brand image for the product. This research, therefore, suggests that in order to uncover the brand image of wool in its various states, not only a consideration of each stage of the whole supply chain but also a combined holistic view must be undertaken. To this end, after the general analysis of the empirical research has been analysed both the individual and whole supply chain brand images will be discussed.

- **THE DEVELOPMENT OF THE HEXANGON**

From Figure 4.4 & 4.5 and the previous literature discussion, it can be seen that the supply chain brand image is the fundamental basis on which a brand identity for naturally coloured wool could be based. Safavi (1996) considered that the product image was important to understand the complex reality of brand image. The brand model seen in Figure 4.5 provides an holistic approach, which could generally be applied to other commodity type markets. To specifically apply this model to the British naturally coloured wool market, it was then necessary to consider what other aspects were important to be able to analyse the current brand identity for each of the products as they pass through the supply chain. Following Safavi's (1996) suggestion regarding the necessity of finding the brand image of the product class, all wool clothing was considered. Since peoples' perceptions of wool clothing may affect their perception of naturally coloured wool, it was decided to encompass these attitudes as part of the brand identity hexagon.

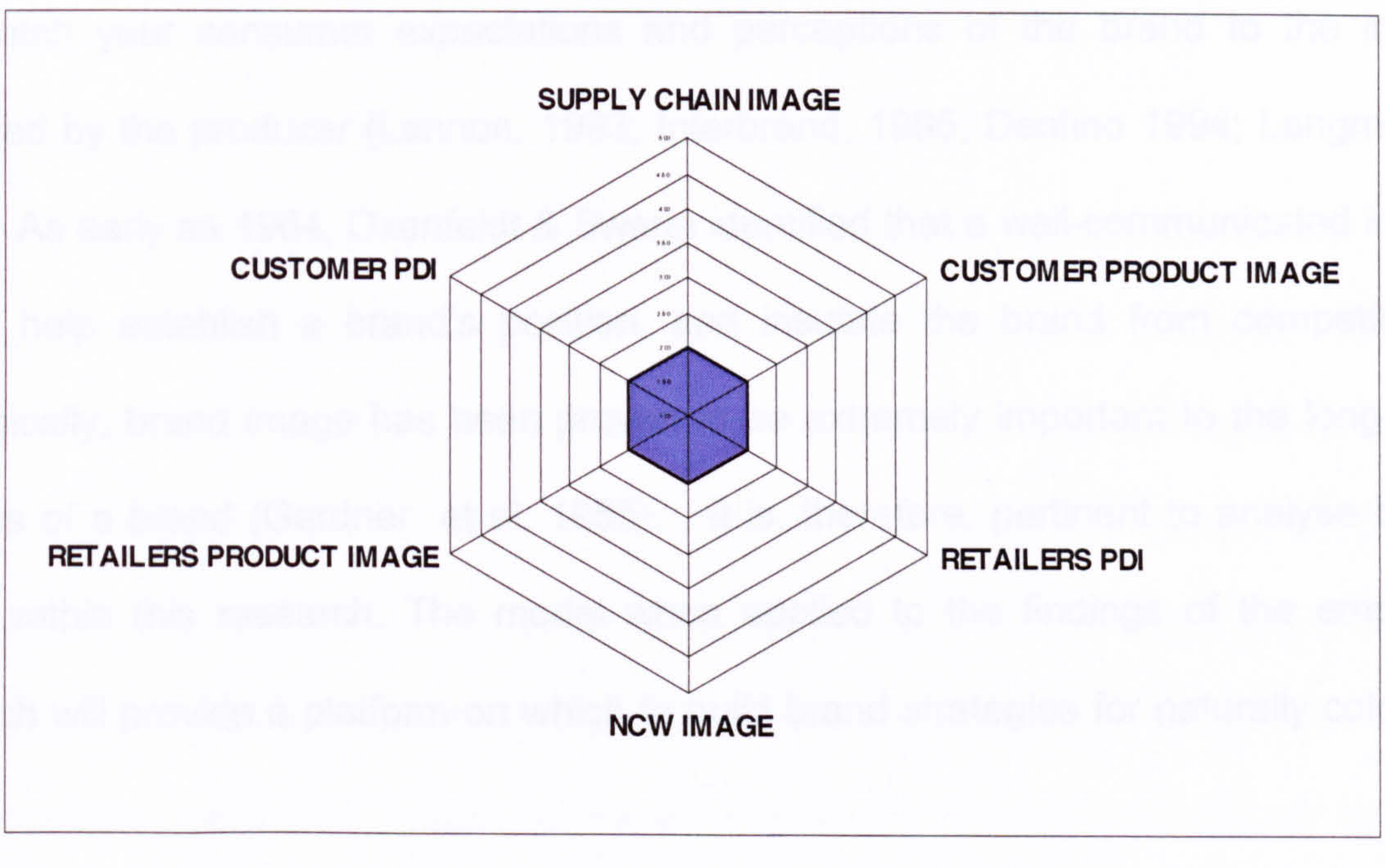
One of the peculiarities of clothing, is that this product acts as a form of communication influenced by social norms, self-expressions and technology (Beck, 1985). It can also be a personal signature that symbolically communicates the social identity that a person seeks to project (Davis, 1985; Dichter, 1985), while also being a reflection of the personality of the wearer (Dichter, 1985; Goldsmith, 1990). A particularly important literature finding for this research is that colour which tends to be a relatively unimportant product attribute, and may actually play a more important role

in low versus high involvement decision making (Grossman, 1999). As this research is specifically interested in naturally coloured wool and since the colour ranges for this product are from a limited colour palette, the image of this attribute is of particular importance.

In order to ascertain the strength of image held it was necessary to consider creating/adapting an existing mathematical model. An area graph was selected as it offered the opportunity to diagrammatically illustrate the strength of image held as all the variables could be plotted against their individual axis. It was decided to place the images of similar categories at opposite sides of the diagram to allow an immediate understanding of any differences in perception. Referring to Figure 4.6, line 1 denotes the corporate image/user image, and line 2 / 5 signifies the seller and the buyer perceptions of the product class respectively. Line 4 depicts the naturally coloured wool image. Lines 3 / 6 have been devoted to the 'purchase decision involvement' of the buyer and seller for that particular stage of the supply chain. This is due to the fact that clothing communicates social identity (Noesjirwan et al, 1982), as well as a yard stick for judging the clothing worn by others (Auty, 1998). It would, therefore, be fair to assume that outer clothing would be seen by consumers as a high involvement product. Also because of the organisational buying behaviour process, buyers in business to business purchasing also tend to be highly involved with the product (Loudon et al, 1993). According to buyer behaviour theory, the higher involved the purchasers are with a product category, the more detailed the information search stage of the buyer behaviour process (Assael, 1998). As a consequence, purchasers

would be interested in all attributes of their clothing including the fabric from which it is made. This would assist naturally coloured wool products, when they were available for purchase, as potential purchasers would be able to compare these attributes against other fabric types. This would hopefully result in the purchasers appreciating the additional properties offered from this wool, leading to purchases of the product.

Figure 4.6 The Brand Identity Hexagon



This research is concerned with developing a brand model and brand strategy for a product that has existed in its current form for over 100 years. When considering the development of a new brand all divisions of the brand (functional/image) must be clearly understood and manipulated to ensure brand success (Hankinson et al, 1993). However, when a product already exists it is more difficult to change functional aspects such as name, packaging, quality etc. In this particular instance, for the brand to achieve success although product modifications are possible they will take many years to complete and therefore altering any product attributes would be extremely difficult to undertake in a dynamic marketplace. A more immediate alternative would be to adjust the 'image'/'personality'. Brand image is mainly achieved through advertising, when you match your consumer expectations and perceptions of the brand to the image portrayed by the producer (Lannon, 1993; Interbrand, 1995; Dentino 1994; Langmeyer, 1994). As early as 1964, Oxenfeldt & Swann identified that a well-communicated image should help establish a brand's position, and insulate the brand from competition. Strategically, brand image has been proven to be extremely important to the long-term success of a brand (Gardner et al, 1955). It is, therefore, pertinent to analyse brand image within this research. The model when applied to the findings of the empirical research will provide a platform on which to build brand strategies for naturally coloured wool.

4.6 BRAND STRATEGIES FOR NATURALLY COLOURED WOOL

Keller (1999) suggests that a ' branding strategy for a firm identifies which brand elements a firm chooses to apply across the various products it sells'. Strategically, a company would select from the hierarchy of brand strategies which includes corporate branding, family, individual and modifier brands. This strategy would then be combined with a supporting marketing programme to assist in the creation of a brand identity. In the case of the naturally coloured wool the exploratory research suggested that various parties across the supply chain were concerned about the development and marketing of these products. However, currently, there is no 'champion' company to add naturally coloured wool to their portfolio of brands.

To enable a branding strategy to be put in place for naturally coloured wool one of the following scenarios would have to take place. The first scenario would be that 'all' naturally coloured wool producers would have to formally co-operate together (since the breed groups are too small), so that they can combine their power to directly influence the supply chain. This co-operation would either be to increase lobbying within the British Wool Marketing Board to participate and assist the producers to operate within the textile system or to develop the marketing techniques already applied by some breed groups, by forming their own alliances further through the supply chain. The second scenario would be that the British Wool Marketing Board would be prepared to champion the development of a brand strategy for naturally coloured wool throughout the supply chain.

In chapter 3, it was suggested that some form of co-operation between parties in the supply chain might be possible. However, what are the options and reasons why these companies should co-operate. There are two key criteria in such types of co-operation they are: the expected duration of the co-operative relationship and the nature and amount of potential value that can be created through sharing or co-operation (Blackett, 2000). Therefore, the BWMB or naturally coloured wool farmers would have to convince the later stages of the supply chain, that their participation for several years would result in additional value for each company involved. Blackett (2000) also suggested that there were four strategic branding options available to companies who wished to enter into co-operative agreements, they are:

- Reach-awareness co-branding. In this situation, this limited level of co-operation would enable the companies to increase awareness of their brand through exposure to their partner's customer base. As such the choice of partners is extensive and even unrelated companies can make use of this strategy

- Values endorsement co-branding. Companies would participate in this type of co-operation because they have or want to achieve alignment of their brand values in the customer's mind. This is achieved through the endorsement of one or other's brand values and positioning or both. As such this reduces the number of potential partners for this strategy.

- Ingredient co-branding. In this type of branding, a brand noted for the market-

leading qualities of its product supplies that product as a component of another branded product. The ingredient provider benefits by assuring sales volumes of their product brand. The assemble/manufacturer benefits by confirming the attributes and image of their product while sharing the market costs

- ❖ Complementary competence co-branding. This method of co-branding is the most sophisticated and involves identification of partners who are likely to want a broader commitment to co-operation whether by alliance or a joint venture.

From the above strategic forms of branding co-operation options 1 and 3, offer the greatest and most immediate solutions to the naturally coloured wool dilemma. If either of these options were selected by those within the naturally coloured wool supply chain, the strategy may overcome the reluctance to use the product and provide an ethical stance for those companies participating in the creation of a brand identity.

4.7 CHAPTER SUMMARY

This literature review has provided a comprehensive discussion on branding definitions and current knowledge on brand elements, especially brand personality, image and identity. This review has identified gaps in current understanding within the strategic brand management, brand image and brand category interface. Three major areas specifically related to this research are: 1) there is no current definition of a commodity/producer brand; 2) there has been little empirical research in brand image; 3) finally there has been no empirical research concerning branding and a complete supply chain. The aim of this research is to advance the knowledge and understanding of branding and its application to commodity markets. This research therefore provides a useful adjunct to the existing literature. To summarise the key branding areas relevant to this study are:

1. Branding terminology is still dynamic
2. Commodity branding is a relatively new area of study
3. Collective brand labels, such as ones developed through co-operative marketing can be a valid technique to change the brand image of a market sector, product or product category as a whole (Kapferer, 1997)
4. It is important to understand brand image and personality in order to create a brand identity

The chapter continued by discussing a conceptual model, which illustrates the complexities and viewpoints of brand components. Examples of the various stages of model application have been shown based on the brand identity relationship hexagon. It concluded by considering forms of co-branding that could be applied throughout the supply chain.

Finally as Goodyear (1996) suggests, brands evolve from being 'unbranded commodities', to brands as 'references'. Subsequently, these brands develop a 'personality' which offers organisational buyers and consumers emotional appeal in addition to functional benefits. Through successive stages the emphasis of the brand gradually shifts from the manufacturer to consumers and at the ultimate stage of 'brand as policy' it stands for social and political issues relevant to consumers.

2.8 REFERENCES

Aaker, D. A., (1996), *Building Strong Brands*, The Free Press, New York.

Alba, J. W.; Amitava, C. (1985), The Effects of context and Part-Category Cues on the Recall of Competing Brands, *Journal of Marketing*, 54, Jan, pp 27 – 41.

American Marketing Association, 1960, *Marketing Definitions: A Glossary of Marketing Terms*, Chicago, American Marketing Association.

Arnold, D., (1992), *The handbook of brand management,* Century Business, The Economists Books.

Anderson, J. R., (1983), *The Architecture of Cognition*, Cambridge, MA, Harvard University Press.

Assael, H., (1998), *Consumer Behaviour & Marketing Action*, 6th edition, South Western College Pub., Cincinnati Ohi.

Auty, S.; Elliot, R., (1998), Fashion Involvement, Self-monitoring and the Meaning of Brands, *Journal of Product and Brand Management*, Vol. 7, no 2, pp 102 – 123.

Beck, K.W., (1985), Modernism and fashion in social psychological interpretation, in Solomon, M. (Ed), *The Psychology of Fashion*, Lexington Book, Lexington, MA, pp 3-14.
Biel, A., (1991), The Brandscape: Converting brand image into equity. *Adamp*, October, pp 41-46.

Biel, A., (1992), How Brand Image Drives Brand Equity, *Journal of Advertising Research,* Vol 32, pt 6, pp 6-12.

Bimler, K. B., (1999), Capturing in a net: Perceptual modelling of product descriptors using sorting data, *Marketing Bulletin*, May, Vol. 10 pp 11 –24.

Blackett, T.; Russell, N., (2000), Co-branding – the science of alliance, *Journal of Brand Management*, Vol. 7, no 3, pp 161 – 170..

Blackston, M., (1992), A Brand with an Attitude: A Suitable Case for Treatment, *Journal of the Market Research Society*, Vol. 34, no 3, pp 232 – 241.

Brand Finance (1999), The Brand Finance Report: Bridging the gap between marketing and finance.

Brassington, R.; Pettitt, S., (1997), *Principles of Marketing*, Pitman Publishing, London

Cohen, D., (1986), Trademark Strategy, *Journal of Marketing*, Vol. 50 Jan

Davis, F., (1985), Clothing & Fashion as Communication, in: *The Psychology of Fashion*, Ed Solomon M, Lextington Book, Lextington M A pp 15 –28.

De Chernatony, L. & Mc Williams, G., (1988), Clarifying the Difference between Manufacturers' Brands and Distributors' Brands. *Quarterly Review of Marketing*, Summer.

De Chernatony, (1989), Branding in an era of retailer dominance. *International Journal of Advertising*, pp 245-258.

De Chernatony, L., (1993), Categorizing Brands: Evolutionary Processes Underpinned by Tow Key Dimensions. *Journal of Marketing*, pp 173-189.

De Chernatony, L. & Olmo Riley, F., (1998), Defining a 'brand': Beyond the literature with expert's interpretations, *Journal of Marketing Management*, Vol. 14, no 5 June, pp 4417 – 444.

De Chernatony, L. & McDonald, M., (1998*), Creating Powerful Brands: in consumer, service and industrial markets*, 2nd edition, Butterworth/Heinemann, Oxford.

Dentino, K., !994, Approaching Direct Marketing from a Brand Orientation, *Direct Marketing,* Feb.

Dichter, E., (1985), What's in an image, *Journal of Consumer Marketing*, Vol. 2, Winter, pp 75 – 81.

Dienfenback, J., (1992), The Corporate Identity as the Brand, in *Branding: A Key Marketing Tool*, ed Murphy J, Mc Millian, Basingstoke, pp 155 – 164.

Dodds, W., Monroe, K. & Gewazl, D., (1991), Effects of price, brand and store information on buyer's product evaluation, *Journal of Marketing Research*, Vol. XXVIII, pp 307-319.

Doyle, P., (1989, Building successful brands the strategic options, *Journal of Marketing Management*, 5 (1), pp 77 – 95.

Doyle, P., (1998), *Marketing Management Strategy*, Prentice Hall, Hemel Hempstead.

Engel, J. F.; Blackwell, R. D.; Miniard, W., (1986), *Consumer Behaviour*, 5th edition, The Dryden Press, Chicago.

Farhi, P. (1993), The Wrong One Baby, Uh-Uh, *Washington Post*, Vol. 116, 28th February, p 5.

Feldwick, P.; Bonnal, F., (1995), Reports of the death of brands have been greatly exaggerated, Marketing & Research Today, May, pp 86 – 94.

Fill, C., (1999), *Marketing Communications: Contexts, contents & strategies*, 2nd edition, Prentice Hall, Hemel Hempstead.

Fuan Li; Nicholls, J. A. F., (2000), Transactional or Relationship marketing determinants of strategic choices, *Journal of Marketing Management*, Vol. 16, no 5, pp 449 – 464.

Gardner, B. G.; Levy, S. J., (1955), The Product and the Brand, *Harvard Business Review*, Vol. 33 March/April, pp 33 – 39.

Goldsmith, R. E.; Heitmeyer, J. R.; Goldsmith, E. B., (1990), Social Values & Being Well Dressed, *Perceptual & Motor Skills*, Vol. 70, p 1010.

Goodyear, M., (1996), Divided by a common language, *Journal of the Market Research Society*, Vol. 38, no 2, pp 105 – 122.

Grossman, R. P.; Wisenblit, J. Z., (1999), What we know about consumer's colour choices, *Journal of Marketing Practice: Applied Marketing Science*, Vol. 5, no 3, pp 78 – 88.

Haigh, D., (1996), Brands. *Marketing Business*, March, pp 41-42.

Hankinson, G.; Cowking, P., (1993), *Branding in Action, Cases and Strategies for Profitable Brand Management*, McGraw-Hill, Maidenhead.

Interbrand 1990, *Brands an International Review*, Interbrand.

Jacoby, J.; Szybillo, G. J.; Busato-Schach, J., (1977), Information asquisition behaviour in brand choice situations, *Journal of Consumer Research*, 3 pp 209- 216.

Joyce, T., 1963, Techniques of Brand Image Measurement, New Developments in Research, *Market Research Society.*

Kapferer, J. N., (1997), *Strategic Brand Management: Creating & Sustaining Brand Equity Long Term,* Kogan Page, London.

Keeble, G., (1991), Creativity and the brand, in: *Understanding brands by 10 people who do*. Ed Cowley D, Kogan Page, London, pp 167 – 182.

Keller, K. L., (1993), Conceptualizing, Measuring and Managing Customer-Based Brand Equity. *Journal of Marketing*, Vol. 57, Jan, pp 1 – 22.

Keller, K. L., (1999), Designing and Implementing Branding Strategies, *Journal of Brand Management*, Vol. 6, no 5, pp 315 – 332.

King, S., (1984), *Developing New Brands*, London, J. W. Thompson.

King, S., (1991), Brand Building in the 1900s, *Journal of Marketing Management*, Vol. 7 pp 3 –13.

Kotler, P., (1996), *Principles of Marketing,* European ed., Prentice Hall, Hemel Hempstead.

Kotler, P., (1997), *Marketing Management: Analysis, Planning, Implementation & Control*, 9th edition, Prentice Hall, New Jersey.

Laforet, S., 1993, The Use of Brand Portfolios, *Marketing Education Group*, PP 571-580.

Lancaster, G.; Massingham, L., (1993), *Essentials of Marketing*, 2nd Ed, McGraw-Hill, London.

Lannon, J., (1993), Branding essentials and the new environment. *Admap*, June, pp 1 – 22.

Langmeyer, L.; Shank, M., (!994), Managing Beauty Products & People, *Journal of Product & Brand Management*, Vol. 3, No 3, pp 27-38.

Lehmann, D. R.; O'Shaughnessy,J., (1974), Differences in Attribute Importance of Different Industrial Products, Journal of Marketing, 38 (2), pp 36 – 42.

Little, J. D. C., (1975), BRANDAID: A Marketing-Mix Model, Part 1: Structure, Operations Research, Vol. 23 no 4, July – August, pp 628 – 653.

Little, J. D. C., (1975), BRANDAID: A Marketing-Mix Model, Part 2: Implementation, Calibration and Case Study, Operations Research, Vol. 23, no 4, July –August pp 656 – 680.

Lutz, R.J. (1993), The Role of Attitude Theory in Marketing, *Business America*, Vol. 113 No 22 November, p 26.

Martin, C. L., (1998), Relationship Marketing: a high involvement product attribute approach, *Journal of Product & Brand Management*, Vol. 7, no 1, pp 6 – 26.
Martineau, P., (1957), *Motivation in Advertising*, McGraw Hill Book Company, Inc., New York.

Mathur, L.K., (1995) The effect of the Advertising Slogan on the Market values of the Firm, *The Journal of Advertising Research*, Vol. 35.

MaCrae, C., (1991), *World Class Brands*, Addison Wesley, Wokingham.

Mitchell, A., (1994), Marketing's new model army, *Management Today*, March, pp 43 – 49.

Murphy, J., (1988), Branding. *Marketing Intelligence and Planning*, Vol. 6, pt 4, pp 4-8.

Newman, J. W., (1957), New Insight, New Progress for Marketing, *Harvard Business Review*, Vol. 35 Nov/Dec, pp 95 – 102.

Noesjirwan, J.; Crawford, J., (1982), Variations in perception of clothing as a function of dress form & viewers' social conformity, *Perceptual & Motor Skills*, Vol. 54 pp 155 –163.

Norris, D., (1992), Ingredient Branding: A Strategy option with Multiple Beneficiaries. *Journal of Consumer Marketing*, Summer, Vol. 9 No 3, pp 19-31.

Oxenfeldt, A.R.; Swann, C., (1964), *Management of the advertising function*, Wadsworth Publishing Co, Belmont CA.

Palmer, A., (1995), Integrating Brand Development and Relationship Marketing, *Journal of Retailing and Consumer Services.*

Park, C.; Jawarski, B.; MacInnis, D., (1986), Strategic Brand Concept-Image Management. *Journal of Marketing*, Vol. 50, Oct, pp135-145.

Patterson, M., (1999), Re-appraising the concept of brand image, *Journal of Brand Management*, Vol. 6 no 6, pp 409 – 426.

Peterson, A. R., (1995), Relationship Marketing and the Consumer, *Journal of the Academy of Marketing Science*, Vol. 23, no 4, pp 278 – 281.

Pitcher, A. E., (1985) The role of branding in international advertising, *International Journal of Advertising*, no 4, pp 241 – 246.

Plummer, J. T., (1985), How Personality makes a Difference, *Journal of Adverstising Research*, Vol. 24, no 6 pp 27 – 30.

Reid, A., (1995), Born again Brands, *Campaign*, Dec 1.

Restall, C.; Gordon, W., (1993), Brands – The missing link, understanding the emotional relationship, *Marketing & Research Today*, May pp 59 – 67.

Richardson, P.; Dick, A.; Jain, A., (1994), Extrinsic and Intrinsic Cue Effects on Perceptions of Store Brand Quality, *Journal of Marketing*, Vol. 58 pp 28-36.

Roselius, T., (1971), Consumer Ranking of Risk Reduction Methods, *Journal of Marketing*, 35 Jan, pp 56 – 61.

Rossiter, J. R.; Percy, L., (1987), Advertising and Promotion Management, New York, Mc Graw Hill Book Company.

Saunders, J. A.; Watt, F. A., (1979), Do Brand Names Differentiate Identical Industrial Products, *Industrial Marketing*, 8 (4), pp 114 – 123.

Savi, F., (1996), Winning the battle of corporate/brand images: An image –focused model for selection of names and logos, Journal of Brand Management, June, Vol. 3 no 6.

Schuttle, T. F., (1969), The semantics of branding, *Journal of Marketing*, 33 (2), pp5-11.

Sinclair, A.; Steward, K., (1988), Effectiveness of Branding a Commodity Product. *Industrial Marketing Management*, 17 pp 23-33.

Shipley, D.; Hooley, G.; Wallace, S., (1988), The Brand Name Development Process. *International Journal of Advertising*, 7, pp 253-266.

Webster, F. E., (2000), Understanding the relationship's among brands and resellers, *Journal of the Academy of Marketing Science*, Winter , Vol. 28, issue 1, pp 17 –24.

Woodward, S., (1991), Competitive Marketing, in Understanding Brands by 10m people who do (Ed) Cowley, Don, Kogan Page, London, pp 119 – 134.

Wyer, R. S.; Srull,T. K., (1989), Person Memory and Judgement, Psychological Review, 96 (1), pp 58 – 83.

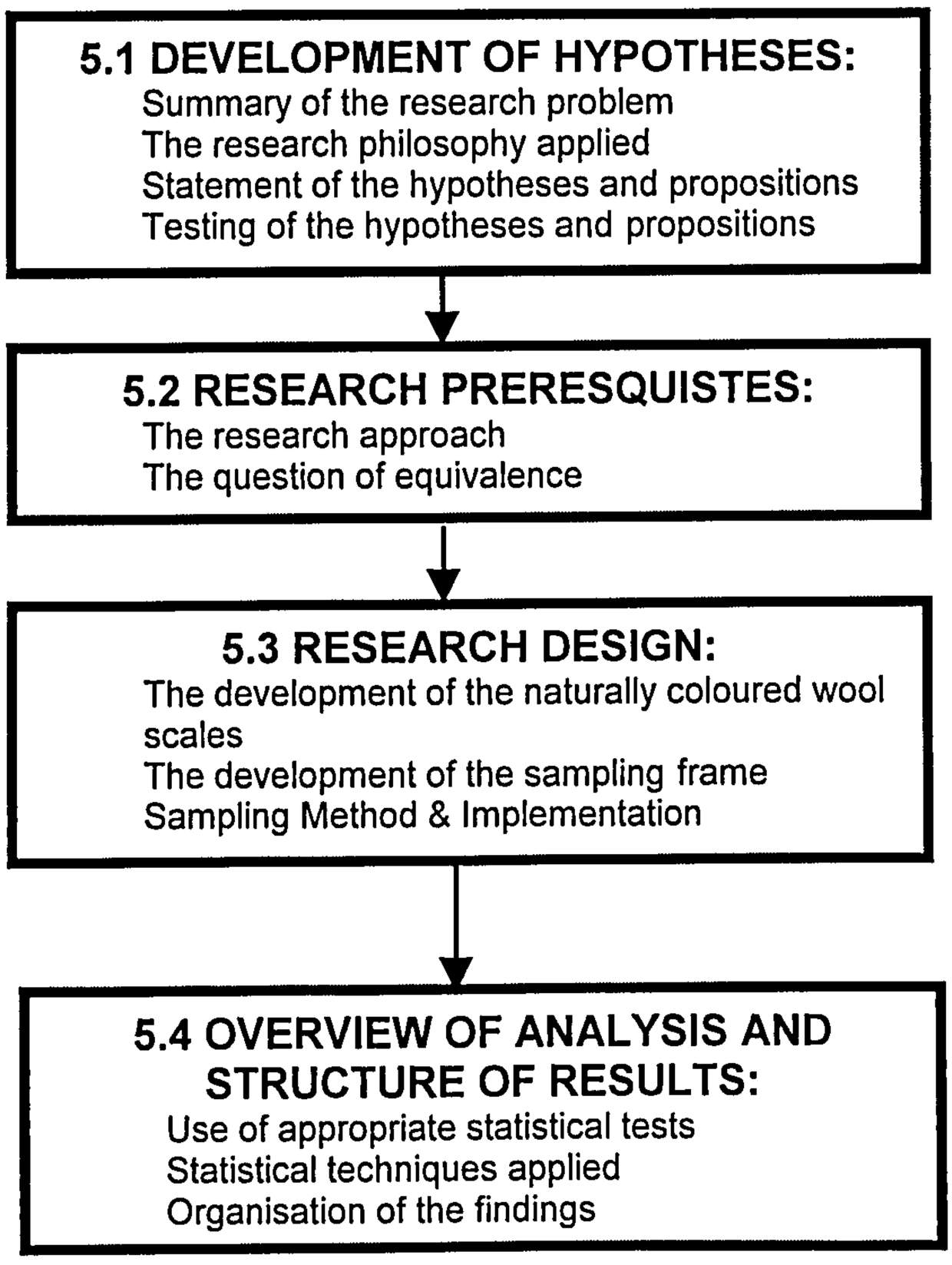
Zeithami, V., (1988), Consumer perceptions of price, quality and value: a means-end model and synthesis of evidence, *Journal of marketing*, Vol. 52, pp 2-22.

CHAPTER FIVE

5.0 INTRODUCTION

The literature review which focused on agricultural marketing and branding theory has identified a gap in knowledge relating to horizontal supply chain brands. Specifically, brand image has been identified as the key factor to aid the application of a consistent brand across a supply chain. This chapter discusses the methodology employed to undertake the analysis necessary to fill this gap. Figure 5.1 details the structure of the chapter.

Figure 5.1 Structure of the Methodology Chapter

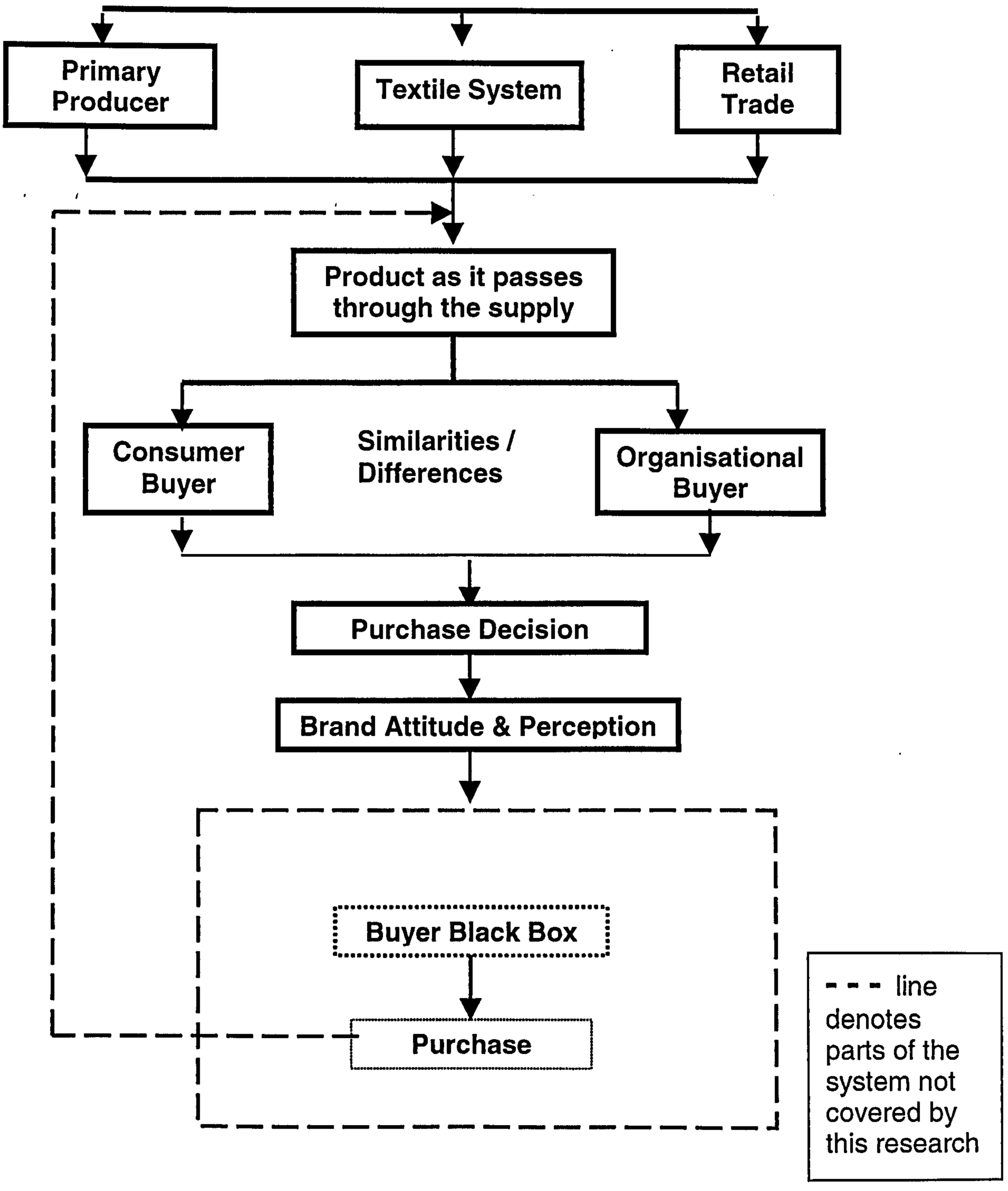


5.1 DEVELOPMENT OF THE HYPOTHESES

The literature review in chapters 3 and 4 established the need for further explanation of how supply chain brands can maintain their brand identity as the product moves through the supply chain. In general, a consistent brand image (name, perceptions etc) is only evident at certain stages of production within the supply chain. However, one of the main reasons for selecting the product under investigation was that it affords an opportunity to conduct an analysis of a brand image along a complete supply chain. The results of the literature review enabled a series of constructs to be developed. This has ensured that the model developed has both genuine validity (i.e. it reflects an image of reality and attempts to be complete) and has face validity (i.e. it is readily recognisable) (Strauss and Corbin, 1998).

There are many facets to a brand (Hankinson et al, 1993; De Chernatony et al, 1992). Brand identity, composing of perceptions and image, was identified as the key factor to understanding how a naturally coloured wool co-brand could be developed within the British wool textile industry. There are also many additional forces such as peer pressure, that affect both organisational and consumer purchases of clothing (Assael, 1998; Hoyer et al, 1997). However, this research has not tried to assess the impact of such areas as they are considered to be beyond its scope. Figure 5.2 identifies the research domain.

Figure 5.2 SUMMARY OF THE RESEARCH DOMAIN



- **RESEARCH PHILOSOPHY**

This research is primarily based on inductive research methods. Literature within the disciplines of marketing, economics, management theory and social psychology has been reviewed and a judgement made about which issues had both particular and theoretical relevance. This was supplemented with qualitative research during several stages of the research to gain a deeper insight into how the literature-based constructs could be contextually operationalised, applying the principles of 'grounded theory' (Strauss & Corbin, 1998). The basis of grounded theory is that as long as there is openness and sensitivity in the handling of literature and a focus on specific issues then patterns for example of beliefs and attitudes to specific brands, will emerge. The philosophy is summarised by Glaser (1992), 'the researcher must have patience and not force the data out of anxiety or impatience ..... He must trust that emergence will occur and it does'.

The research methodology applied to this research will be based on the interactive/non-economics perspective of systems in marketing (Sheth, 1988). A systems philosophy has been adopted to empirically test the similarities or differences of the brand image for naturally coloured wool between the 'end consumer' and the organisational buyer. A purely positivist or phenomenological approach would not allow a full understanding of the interactions of the actors within the supply chain. To this end, systems methodology has been employed where both qualitative and quantitative information is analysed to develop deeper knowledge of the activities occurring within the supply chain. The argument, therefore, is a relativist stance and

accepts that there is no construct that will completely cover all circumstances. In order to provide a statistical basis, the primary empirical instruments employed were positivistic in nature. However, it was acknowledged it was not possible to provide a purely numerical answer to the information gap. The data measures employed, therefore, applied within the research were selected as the best possible in light of the qualitative nature of the data.

- **EXPLORATORY RESEARCH**

To assist in the development of the hypotheses and propositions, it was decided to undertake exploratory research which can be seen in Figure 5.3. Stage 1 involved the identification of industry experts by judgement selection and a willingness to participate in the research. It should be noted that at all stages of this research within the processing element of the supply chain participation rates have always been high. In-depth interviews of these experts allowed a deeper understanding of the key concepts to be identified with each interview taking approximately 1- 2 hours, they were tape recorded and subsequently transcribed and analysed for key trends.

Stage 2 involved the confirmation of these key trends and took the form of an industry mail survey census to the processing element of the supply chain. This specific target group was selected due to the identification from the in-depth interviews that the main 'block' for this product appeared to be within these stages of the supply chain. A questionnaire was developed based on the in-depth interviews, pilot tested by the

original industry experts and mailed to organisations within the wool trade directories. A response rate of 80% was achieved for this survey. After analysis of these questionnaires allowed the development for the first part of the empirical research, the industry related hypotheses and propositions. Focus groups were then performed to obtain insight into the consumer purchasing element for the empirical research and to assist in the development of hypotheses and propositions, for a detailed discussion see page 151 Scale Development.

Figure 5.3 EXPLORATORY RESEARCH

Stage of Research	Information Collected	Research Method Applied	Sample
1	Exploratory qualitative data collection	In-depth interviews	Shetland Islands: - Wool Broker Wool mill owner Co-operative Production Group Shetland Island Wool Agency UK: - British Wool Marketing Board (BWMB) Carpet Marketing Manager Shetland Sheep Breed Society Rare Breed Society Hand Spinner Sheep Farmer Fabric Factor Agent Furnishings Manufacturer France: - French Wool Co-operative Worker
2		In-depth interview analysis and formulation of hypotheses and propositions	
3	Quantitative Data Collection	Mail Wool Industry Survey to confirm areas for hypotheses and propositions	Census of organisations involved in wool purchase and production within the UK
4		Analysis of survey. Confirmation of industry hypotheses and propositions	
5	Qualitative Data Collection	Focus Groups	Representative samples of: - Spinners Weavers General Public Consumers 18 – 29 and 30 – 60+ year olds
6		Analysis of focus groups	

- **STATEMENT OF HYPOTHESES AND PROPOSTIONS**

An hypothesis is an unproven statement or proposition about a factor or phenomenon that is of interest to the researcher (Malhotra, 1993). Judd et al (1991) stated that it is frequently not possible to directly test a hypothesis as the construct(s) involved are not observable. As a result, it is valid to test subsidiary hypotheses that are logically derived from the first (Judd et al, 1991). Figure 5.4 states both the main and subsidiary hypothesis.

A hypothesis is proven if its suppositions are borne out by empirical validation (although where it is not possible to obtain positive proof to confirm the hypothesis, it is more usual to disprove the opposite 'null' hypothesis). However, care needs to be exercised in the use of the term hypothesis. Its general usage in scientific literature is associated with statements, which can be proven or disproved. In social sciences, phenomena are generally less clearly definable than in the natural sciences and a clear statement of proof or disproof is not always possible. It is, therefore, common to talk about research propositions rather than hypothesis. The former implies the testing of a statement whose outcome may be a balanced discussion rather than a definitive proof or disproof.

This study states a series of hypothesis for testing, but it must be borne in mind that many of these cannot be positively proven or disproved. They may, therefore, be more characteristic of research propositions than hypothesis (Bilton et al, 1987). Due to the philosophical stance, this research has applied both propositions and hypotheses in the creation of the empirical instrument. These are detailed in Figure 5.4.

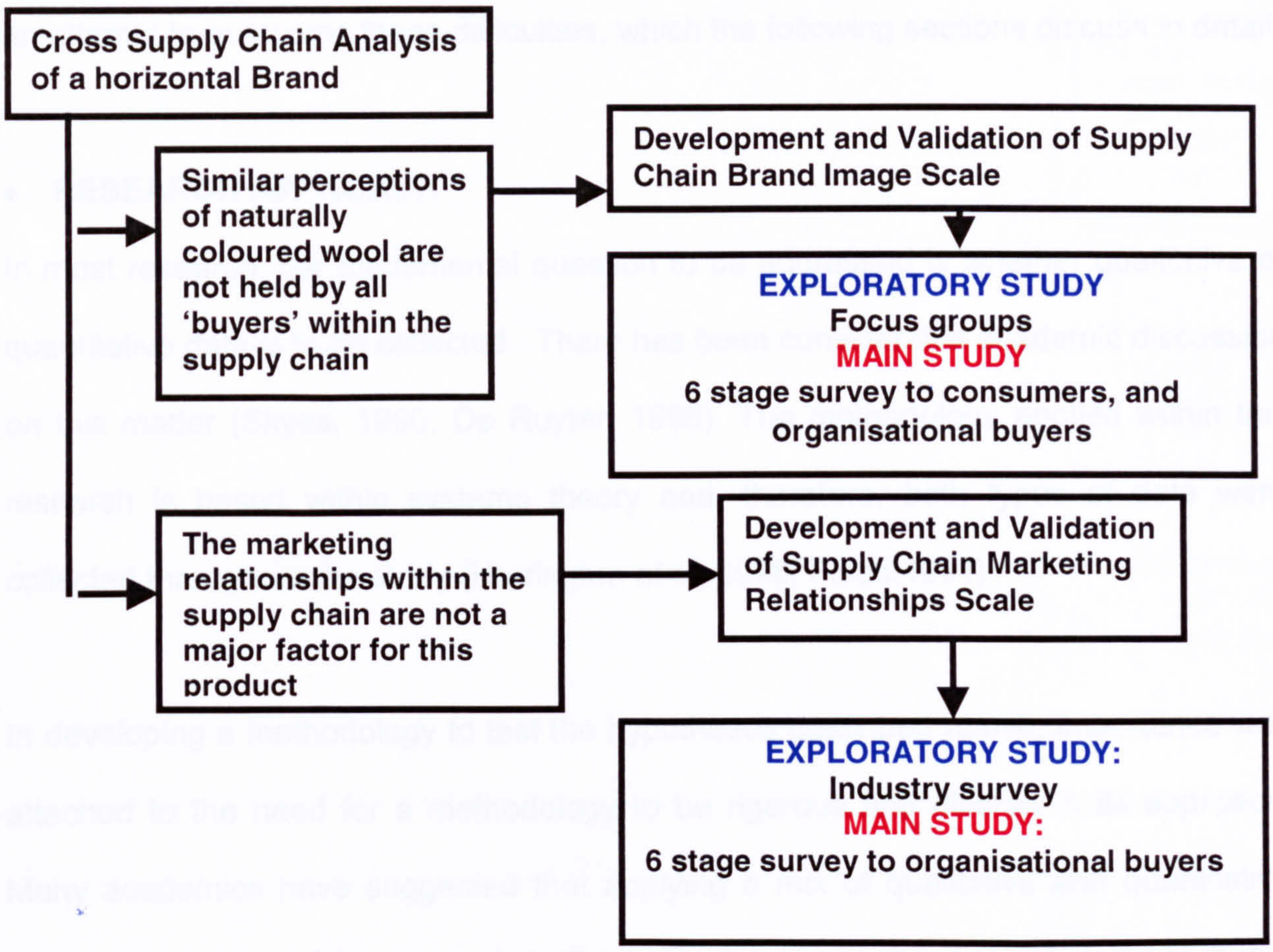
Figure 5.4 Summary of Hypotheses and Propositions

	Key Hypotheses	Null Hypotheses	Propositions Tested by Findings
1	Positive perceptions of naturally coloured wool are not held by all 'buyers' within the supply chain	Consumers perception is that all wool clothing is easy to obtain	
		Intrinsic and extrinsic attributes of wool clothing are not understood by consumers	
		Across the supply chain stores in which 'I' shop which sell wool clothing are not seen as being cool and trendy	
		There is not a divergence of opinion across the supply chain on store attributes when the 'individual' purchases wool clothing	
		Characteristics of a typical wool clothing purchaser cannot be identified by separate groups across the supply chain	
			Brand name is the most important criteria in consumer purchase decisions
			1st person perceptions of naturally coloured wool can not be identified across the supply chain
			3rd person perceptions are the same as 1st person above
2	The marketing relationships within the supply chain are not a major factor for this product	There is not a significant difference in opinion between parties in the supply chain	
			Naturally coloured wool farmers keep sheep purely for financial purposes
			There is a high level of relationship marketing within the supply chain

- **TESTING THE HYPOTHESES AND PROPOSITIONS**

Figure 5.5 outlines the structure of the empirical research, which was implemented to test the identified hypotheses. The key hypotheses for this research were tested applying a variety of techniques. The scales for inclusion within the main data-collecting instrument were obtained from in-depth interviews, industry survey, focus groups and validated marketing scales. The main empirical instrument was a questionnaire, which was administered as a postal survey to those working within the supply chain and an interviewer questionnaire to end consumers.

Figure 5.5 The Empirical Framework



5.2 RESEARCH PRERESQUISTES

Before discussing the research design a number of issues need to be addressed. There are many difficulties in undertaking a cross supply chain study, some of them can be summarised as follows:- difficulty in obtaining up to date sampling frames, gaining insight to the respondents understanding of brand identity, the writing of meaningful questions that are pertinent across the supply chain, gathering and analysis of the data. Due to the literature gap mentioned previously, the author has been unable to obtain any similar studies, which consider brand identity across a supply chain. As a consequence, a selection of research techniques were employed in an attempt to overcome these difficulties, which the following sections discuss in detail.

- **RESEARCH APPROACH**

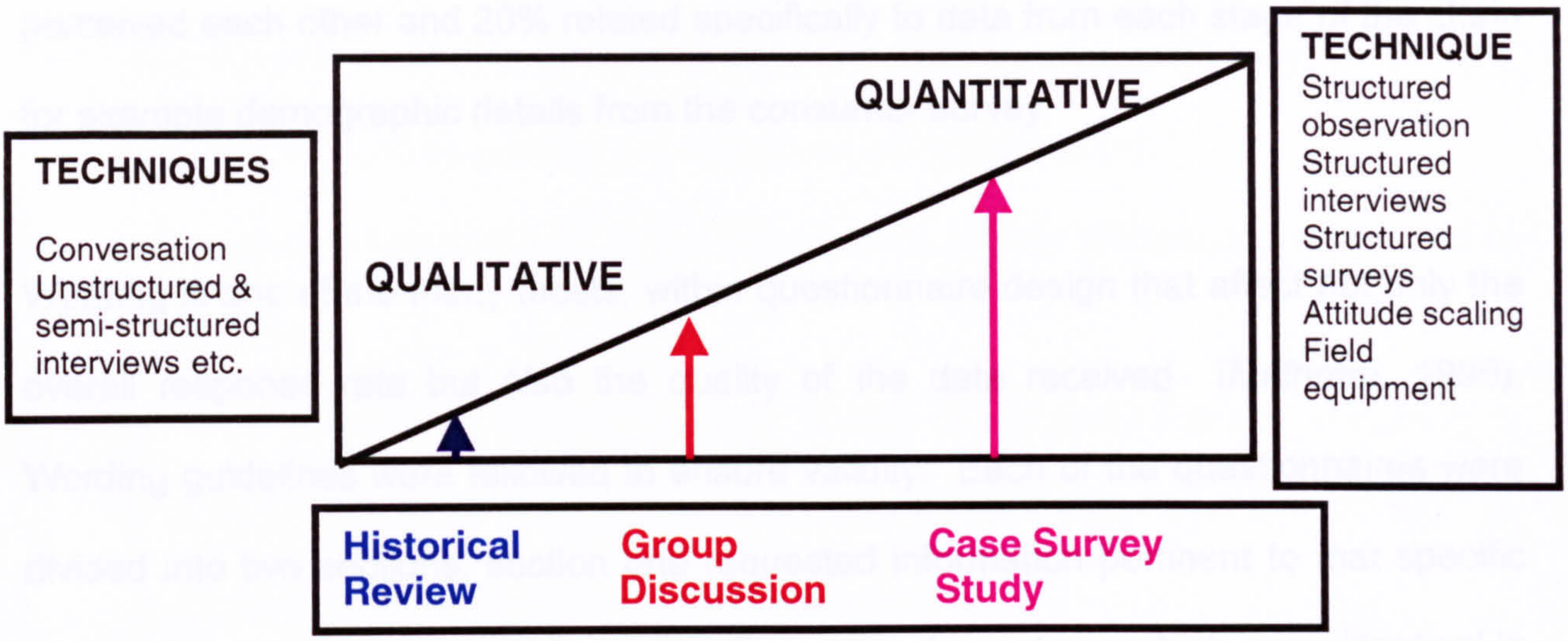
In most research, the fundamental question to be addressed is whether qualitative or quantitative data is to be collected. There has been considerable academic discussion on this matter (Skyes, 1990; De Ruyter, 1996). The methodology applied within this research is based within systems theory and, therefore, both types of data were collected throughout the study (Harrington et al, 1998; Flood,1991).

In developing a methodology to test the hypotheses described above, importance was attached to the need for a methodology to be rigorous and diverse in its approach. Many academics have suggested that applying a mix of qualitative and quantitative techniques as part of the research method aids the development or extension of theory

as well as testing its application empirically. (Kinnear and Taylor, 1996; De Ruyter, 1996; Jarratt,1996; Colwell, 1990; Straus et al, 1990; Jick, 1983; Van Maanen, 1983).

Figure 5.6 illustrates the qualitative/quantitative research methods continuum. During this research three separate research methods have been employed in order to develop the main empirical instrument (denoted by the arrows).

Figure 5.6 Qualitative and Quantitative methods and techniques
(Adapted from Ghauri, Gronhaug & Kristianslurd, 1995)



Despite the rising popularity of qualitative research, this approach has its weaknesses. The most serious weakness is that it tends to be time consuming and, therefore, expensive to undertake. It relies on small sample sizes, which may not accurately represent the population being studied. This research combines as suggested the use of qualitative and quantitative techniques to enable a valid set of results to be obtained.

- **EQUIVALENCE OF THE QUESTIONNAIRES**

For a direct comparison to be made between the six parties in the supply chain a questionnaire was devised. The overall objective of the research instrument was to obtain perceptions and attitudes to wool clothing from each stage of the supply chain as a means of establishing the brand image of naturally coloured wool. To this end, identical questionnaires might be considered ideal. In reality, 70% of the survey questions were identical or equivalent, 10% related to how members in the chain perceived each other and 20% related specifically to data from each stage of the chain for example demographic details from the consumer survey.

Wording is one of the many facets, within questionnaire design that affect not only the overall response rate but also the quality of the data received (Malhotra, 1999). Wording guidelines were followed to ensure validity. Each of the questionnaires were divided into two sections: section one requested information pertinent to that specific sector of the supply chain, while section 2 contained questions which were identical in construction and worded to each specific sector.

For the analysis of section 2, which would allow the cross supply chain comparisons it was necessary to ensure that the questions asked were of an equivalent nature. To this end there were two types of question asked to all parties: 1)– those where the questions were worded for all the respondents to answer as end consumers, and 2) where the questions were worded the same <u>except</u> for the product they were purchasing. Also within the questionnaire each party was asked for their view on the

other parties within the supply chain, so that a cyclical understanding could be achieved.

Figure 5.7 reproduces the conceptual model discussed in Chapter 4, Figure 4.5, which depicts brand imaging throughout the supplychain. From the diagram it can be seen that:-

1. The arrows show that within any section brand imaging involves at least three parties – the supplier, product and buyer.
2. Each party is capable of having three possible decisions on their image of a product, it could be positive (+), negative (-) or impartial (~).
3. Each party has an attitude to the other parties in their immediate section and to themselves.
4. In order to identify attitude changes in any of the party's brand images it is necessary to obtain their beliefs in relation to each other and the product, so that brand image strategies can be developed.

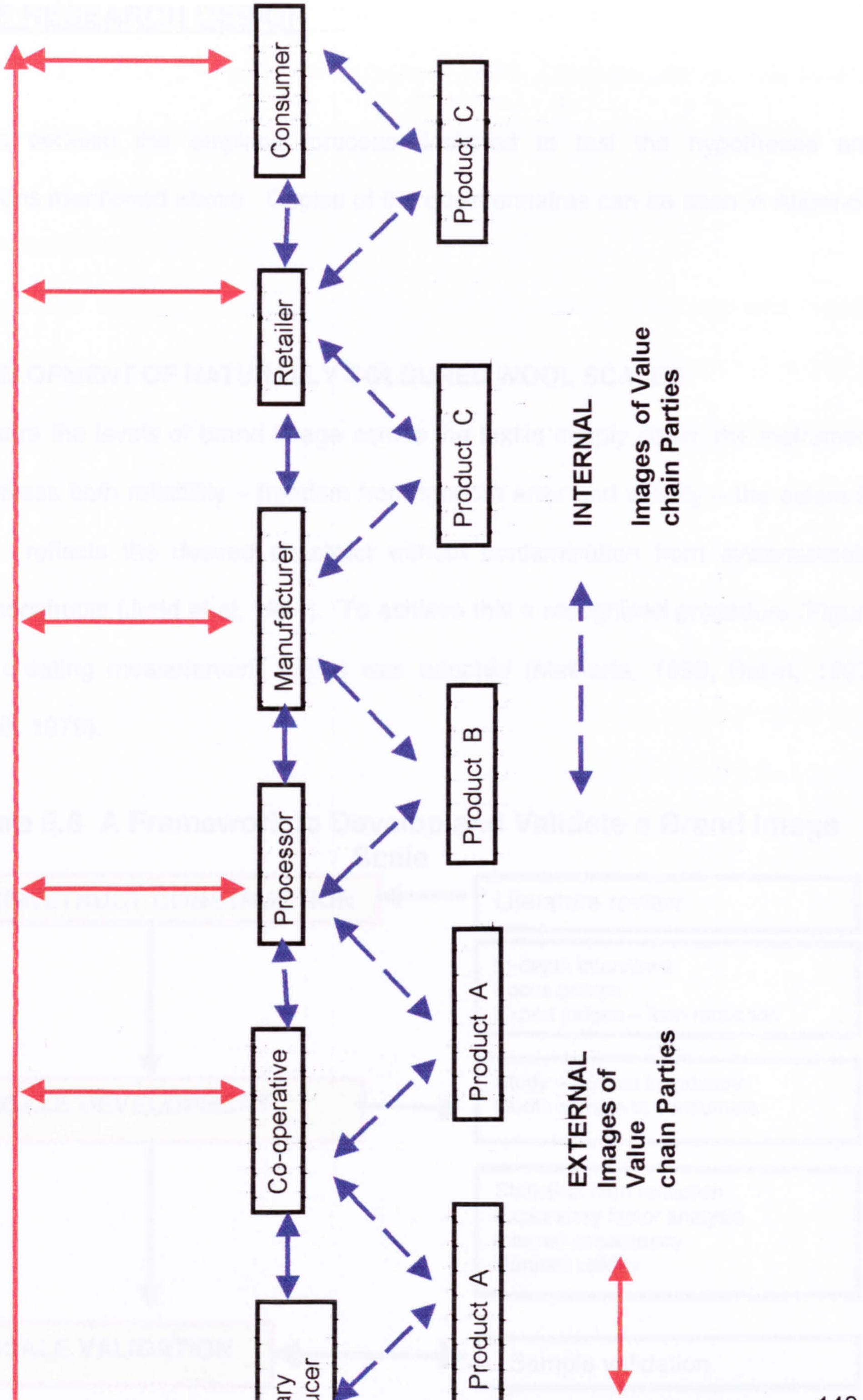


FIGURE 5.6 MAPPING OF BRAND IMAGES WITHIN THE SUPPLY CHAIN

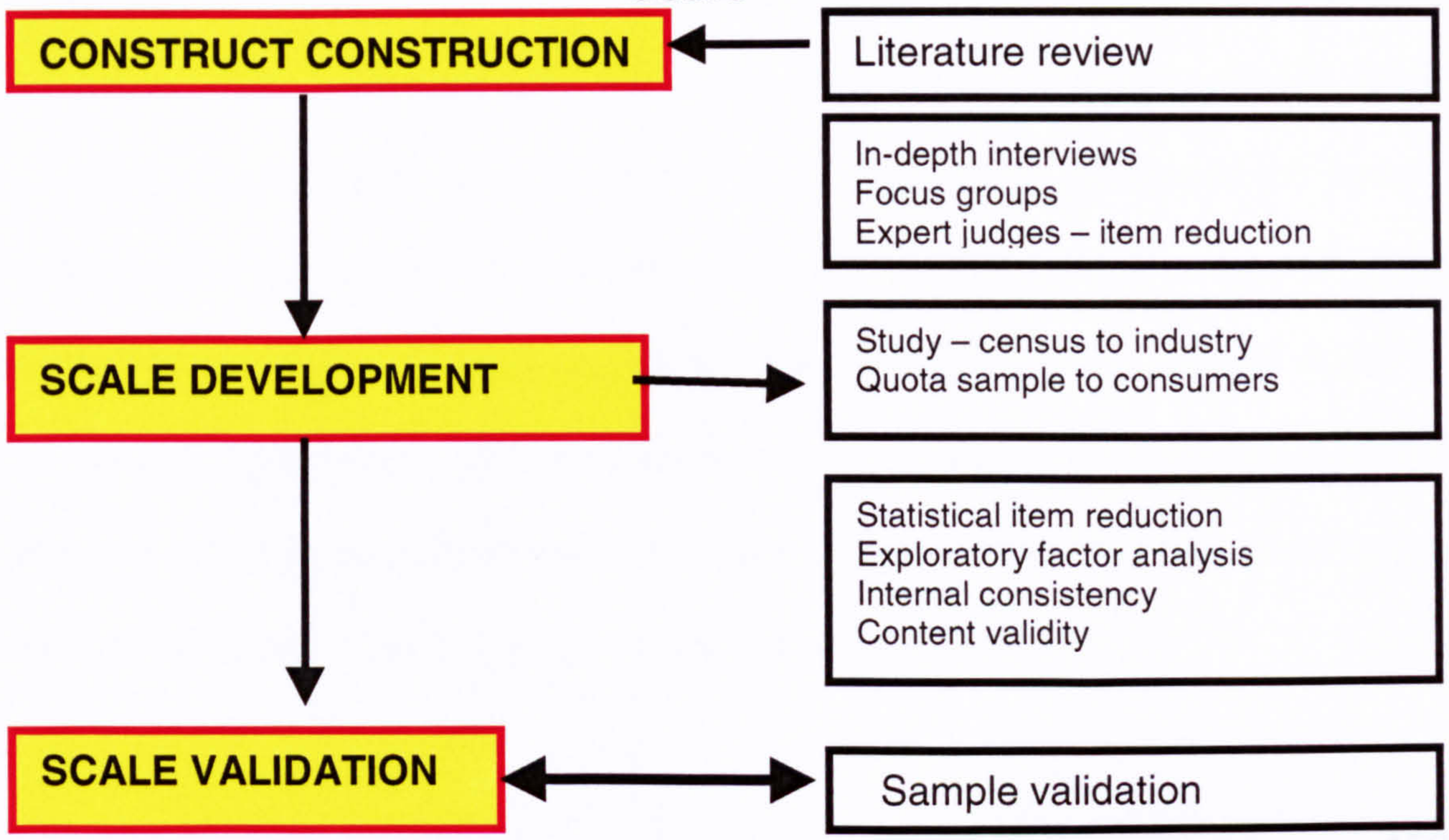
5.3 THE RESEARCH DESIGN

Below is detailed the empirical process designed to test the hypotheses and propositions mentioned above. Copies of the questionnaires can be seen in Appendix B.

- **DEVELOPMENT OF NATURALLY COLOURED WOOL SCALES**

To measure the levels of brand image across the textile supply chain, the instrument must possess both reliability – freedom from random error and validity – the extent to which it reflects the desired construct without contamination from systematically varying constructs (Judd et al, 1991). To achieve this a recognised procedure (Figure 5.8) for creating measurement scales was adopted (Malhorta, 1999, Babin, 1997, Churchhill, 1979).

Figure 5.8 A Framework to Develop and Validate a Brand Image Scale



Many authors have identified techniques for the development and evaluation of measuring instruments (Malhotra, 1999, Churchill, 1999; Churchill, 1997). This study, therefore, applies these techniques in order to create a construct for this research.

- **THE CONSTRUCT OF BRAND IDENTITY**

There are many different definitions of brand identity, brand personality and brand image, which have emerged in the literature (see chapter 4). The common concept is that brand identity is composed of the brand image in the minds of both the supplier and purchaser and the brand personality.

There are many aspects that form the bases of brand image. The key articles in brand identity and image were examined to establish an initial listing of potential dimensions. The listing was then analysed and evaluated for the content, context and validity of the dimensions. The final listing resulted in the initial conceptualisation pool of the brand image construct.

- **SCALE DEVELOPMENT**

The next stage of the construct development required an empirical investigation of the content of the components of brand image. In order for this to be achieved an instrument for measuring brand image had to be created and applied to the industry and consumer.

The scale items generated specifically related to wool clothing although it may be possible to alter them to encapsulate any commodity product.

The generation of the initial items pool followed the common secondary research, qualitative research and informed opinion (Babin, 1994). Factor analysis was applied to purify the scales, which also served the purpose of determining the number of separate components that existed (Spector, 1992).

The creation of the scaling categories for the main data collection instrument was achieved through in-depth interviews and focus groups, whose selection of participates and moderation were consistent with the recognised techniques (Greenbaum,1993; McDaniel,1995; Jarrett, 1996; Strauss et al, 1998). Four focus groups of 10 people were undertaken to represent opinions from the main parties for this research. The industry representatives were selected by a convenience sample from the Guild of Spinners, Weavers and Dyers. While the consumer focus groups were selected on the bases of purchase of wool clothing within the past twelve months and age, resulting in one group of respondents being 18-29 and the second 30-60+.

The focus group discussions were video taped and the in-depth interviews were voice taped. During the focus group interview several projective techniques were employed to explore the participant's thoughts, feelings and experiences. These are an excellent method to establish the 'why' behind 'what' in participant perspectives (Will, 1996). As Oppenheim (1992) stated 'such techniques allow accurate information undistorted by interviewing problems or psychological barriers to be generated'. Will (1996) suggests that projective techniques can be classified under five headings. Figure 5.9 illustrates the techniques applied in this research against this classification.

Figure 5.9 Illustrating the Projective Techniques applied in this research

(Adapted from: Will, 1996)

	Projective Technique	Applied in this Research
1	Association	Yes
2	Completion	Yes
3	Construction	Yes
4	Choice Ordering	No
5	Expressive	No

In developing scale measures for the dependent and independent variables of the proposed model, guidance was taken from the principles proposed by Churchill (1997).

Marketing scales were created by question type for the main data collection instrument by using the following methods:-

i. The responses were amalgamated.

ii. Each word was then checked in a Thesaurus for alternative word/phases.

iii. Double counting of words was then taken into consideration and deleted.

iv. The remaining word lists were then judged for their appropriateness and descriptive qualities by a quota sample of 10 people from the research population.

v. These word lists were then used as the basis of the brand image questionnaire.

The literature review identified that there were no other validated scales developed within this sphere of research to allow any form of comparison to take place. Mittal's (1989) Purchase Decision Involvement Scales were, however, of relevance to the process of constructing an appropriate instrument.

All the scales were applied in the questioning of the industry census. It is often difficult to obtain a high response rate from industry representatives. Within the time frame constraints, a complete pilot and retest for this research was not undertaken due to two factors. Firstly, the limited sample population where pilot test respondents would be asked for their opinions twice, thus effectively analysing the same responses again. However, this position would only occur on the basis of the respondents agreeing to complete the questionnaire a second time. Secondly, in order for the respondent's attitudes to change an external stimulus is required and this did not occur during the research period. A decision was, therefore, made not to undertake a full pilot test on the industry but instead to seek assessment of the scales from several industry experts.

A pilot test could also have been undertaken in the consumer sample. Attitudes and perceptions can alter over time (Assael, 1998). However, in this research the lack of a change stimulus and restrictions of time and resources resulted in a complete pilot study not being undertaken. It was also considered that without the ability to fully test the scales within the industry, a consumer pilot would not provide enough reliability in the study. Therefore, several marketing experts were also asked for their assessment of the scales.

As a result, this exploratory empirical research will allow reliability and validity tests to be undertaken to create valid scales. These scales could then be applied in the future to identify alterations in brand image.

- **THE NATURALLY COLOURED WOOL SURVEY**

The purpose of the survey was to identify 'buyers' perceptions and attitudes to naturally coloured wool and levels of involvement with the product. The survey also allowed information to be gathered on relationship marketing within the supply chain. As indicated earlier three distinct scales were developed:

1. Relationship marketing within the supply chain;
2. Consumer attitudes to naturally coloured wool
3. Wool purchase in general as a third party response.

The selection of the wool 'brands' were based on two factors: brands in every day use mentioned on wool clothing labels and a selection of breed specific brands currently sold through retail outlets.

- **THE SAMPLING FRAMES**

Each section of the supply chain required different sampling techniques and administration due to size and availability of sampling frames (Kinnear et al, 1996; Malhotra, 1993). Following guidelines for sample frame construction (Kinnear et al, 1996), separate sampling frames were generated, applying two sample procedures. Due to the relatively small numbers of sample elements at each stage of the supply chain, a decision was made to undertake a census. While at the consumer stage, a quota sample was applied based on published national statistics.

❖ **DEVELOPMENT OF THE SHEEP FARMERS SAMPLING FRAME**

As previously discussed in chapter 3, there are only a small number of farmers in the U.K. who breed sheep for their wool. As this research investigated the perceptions of coloured wool, farmers who only keep sheep for meat were not considered appropriate for inclusion in the sampling frame. As a result, only coloured sheep breeders would be eligible to take part in the survey.

The sheep farmer sampling frame was developed from the UK Coloured Sheep Breeders 1998 directory by including all entries. There are separate sheep breed

groups within the U.K., the largest being the Shetland Wool Association. To assist in the development of the sampling frame the Shetland Wool Association 1998 database was also included. The Shetland Breed Group was included because exploratory research had suggested that their attitudes and perceptions would be different from those within the Coloured Sheep Association.

To ensure that double counting did not take place between these data sources, the Coloured Breed Directory sample frame was checked against the Shetland Breed database. The resulting sampling frame then received a sheep farmer mail questionnaire with an individually addressed letter and reply paid envelope.

A response time of four weeks was implemented. After this time respondents were re-mailed with a new covering letter offering a telephone interview if preferred. The final response rates can be seen in Figure 5.12

❖ DEVELOPMENT OF THE TEXTILE SUPPLY CHAIN SAMPLING FRAME

Due to the complexities of organisation ownership within the textile supply chain, a sampling frame was created by placing companies in one of the following categories: wool buyers, processors, clothing manufacturers.

Textile trade directories (Kendale, 1998; Wool Trade,1998), were inspected to identify companies who dealt with wool and to obtain descriptions of their principle activities. Where a controlling company had identifiable subsidiaries throughout the supply chain,

each was allocated to one of the three categories. If however, several activities were undertaken (such as spinning and weaving) within a company then the allocation depended on the principal activity description provided in the directories. Due to the small number of companies within each industry a decision was made to census all companies to allow the largest possible response rate.

A mail survey (with a reply paid envelope) was undertaken where, the letter was personally addressed to the wool buyer. One of the difficulties of applying a directory sampling frame concerns how current the listings are within the directory (Malhorta, 1999). Textile trade directories were inspected and a sampling frame taken for each section of the supply chain ensuring that the company was not double counted. The inclusion of a replied paid envelope allowed questionnaires to be returned by the Post Office if the organisation had ceased trading. This enabled the original sampling frame to be redefined (Malhorta, 1999).

A response time of four weeks was implemented. After this time respondents were re-mailed with a new covering letter offering a telephone interview if preferred. The final response rates can be seen in Figure 5.12

- **DEVELOPMENT OF THE RETAIL INDUSTRY SAMPLING FRAME**

Exploratory research identified a list of retail outlets associated with the sale of wool garments. To create a retail sampling frame this list was validated by checking the store description in the Retail Trade Directories (1998), as well as Mintel's

Womenswear Retailing Report(1998). The list was then pre-tested amongst a convenience sample of 100 people to ensure that these store names were associated with wool clothing. The mail questionnaires (with a reply paid envelope) were then personally addressed to the main clothing buyer.

- **DEVELOPMENT OF THE CONSUMER SAMPLING FRAME**

Due to the large sample population size for end consumers, a decision was made to undertake a quota sample. The towns were selected by two criteria: geographic location and recruitment cost (Bristol, Birmingham, Hemel Hempstead, Milton Keynes and Nottingham). The break down of the quota sample categories can be seen in Figure 5.10. The number required within each quota was based on 1998 Census figures for the U.K., taking into consideration age, gender and income levels (see Appendix B for details).

Figure 5.10 Quota Sample Frame for Consumers
Source: Census Figures Annual Abstract of Statistics, (1998)

AGE RANGE	QUOTA EXPECTED %	QUOTA EXPECTED NO.	1996 CENSUS FIGURES* ('000)
11 – 20	15	65	7227
21 – 30	20	87	8361
31 – 40	20	87	}
41 – 50	20	87	}23509
51 – 60	15	65	}
61+	10	44	7820

- **LOCATION OF INTERVIEWS**

Based on the regular use of shopping locations by typology of shopper (Figure 5.11), the interviews were conducted in high streets and covered mall. It was important to be able to select from shoppers who have some level of involvement with their clothing purchase to ascertain their attitudes and perceptions for analysis. Figure 5.11 illustrates those who are addicted, happy and purposeful in their shopping are to be found in the high street, covered mall and regional shopping centres which suggest that these would be the best locations to interview potential purchasers. Both regional shopping centres and retail parks were excluded from the survey on the bases of the low percentage of regular shoppers in December 1997 (BMRB/Mintel, 1998)(see Appendix B).

Figure 5.11 Classification of Shoppers in Different Locations
Source BMRB/Mintel, 1998

	All %	High Street %	Another City %	Covered Mall %	Regional Shopping Centre %	Retail Park %
Addicted Shoppers	22	27	26	35	39	26
Happy Shoppers	15	19	15	14	13	16
Purposeful Shoppers	33	34	35	30	26	35
Reluctant Shoppers	17	13	11	13	4	14
Obstinate Shoppers	11	7	13	7	18	9

Geographically, a convenience sample was utilised with interviews taking place in Bristol, Birmingham, Hemel Hempstead Milton Keynes, and Nottingham. All five

locations offered an opportunity of a wide range of socio groupings to be interviewed and a large population size which could be included in the survey (See Appendix B).

The interviews took place during the months of April and May 1998, so that consumers would have recently experienced both winter and spring fashion collections from which purchasing information could be gathered.

- **SAMPLING METHOD**

As previously discussed, due to the size of the population and desired response rates, it was decided that the sampling method should vary between the parties in the supply chain and can be seen in Figure 5.12.

❖ **SAMPLE SIZE**

A non-response could result from a number of factors including inaccurate addressing of the questionnaire, inaccurate listing in the directory or the respondent not willing to participate in the survey. The first two causes of non-response would most likely be randomly distributed across all members of the sample and their omission would therefore cause little bias in the information obtained. However, non-response caused by individual's unwillingness to co-operate could present a more serious bias. It is quite possible that the behavioural act of non-response is indicative of attitudes, which distinguish non-respondents from respondents.

In other words, in quantitative research emphasis is on standardisation of information at the possible expense of quality of information. This is an argument behind the frequently

made assertion that non-sampling error is lower in qualitative research than quantitative research: that a priori qualitative information is more valid (Cooper & Branthwaite, 1977).

In order to try and overcome these issues the standard procedures for improving response rates were followed (Malhorta,1999; Churchill, 1999; Chisnal,1997):

1. Prior notification: The preliminary questionnaire mailed to the industry asked for further support with the main study
2. Motivating and incentives: Those within the textile system were offered a copy of the main results for their participation
3. Questionnaire design: The industry survey mailings were to identified people within each company. By applying a quota, those administering the consumer survey could replace non respondents within a given location
4. Follow-up: Was undertaken to those companies who did not respond and whose original mailings had not been returned

The actual sample size was determined in two ways: by the number of companies at each stage of the textile system and the minimum sample size for problem identification research (Malhorta, 1999). The actual sample frame size can be seen in Figure 5.12.

Figure 5.12 Naturally Coloured Wool Research Sample Frames

(adapted from Kinnear, 1991, Churchill, 1979)

STEPS IN SELECTING A SAMPLE				
DEFINE THE POPLUATION	**IDENTIFY THE SAMPLING FRAME**	**DETERMINE THE SAMPLE FRAME SIZE**	**ACTUAL SAMPLE SIZE**	**SELECT SAMPLE PROCEDURE**
Sheep Farmers	**Coloured Sheep Breeders Association Directory 1998** **Shetland Sheep Breeders Association Data Base 1998**	**162** **108**	**70** **51**	**Census**
Wool Buyers	**Kendale Textile Directory 12th Wool Trade Directory of the World 1997**	**57**	**10**	**Census**
Wool Processors	**Kendale Textile Directory 12th Wool Trade Directory of the World 1997**	**91**	**17**	**Census**
Manufacturers	**Kendale Textile Directory 12th Wool Trade Directory Of the World 1997 TIWC 1996**	**97**	**10**	**Census**
Retailers	**Retail Directory of the UK 1998**	**100**	**10**	**Census**
	Total Industry Sample	**615**	**168**	
Consumers	**QUOTA CRITERIA** **10 – 19** **20 – 29** **30 – 39** **40 – 49** **50 – 59** **OVER 50**	**NUMBER IN QUOTA** **50** **100** **100** **100** **50** **100**		**Quota by geographical locations** **Bristol** **Birmingham** **Hemel Hempstead** **Milton Keynes** **Nottingham**
	Total Consumer Sample	**500**	425	

- **SAMPLE IMPLEMENTATION**

❖ **INDUSTRY SAMPLE**

The mail survey letters and questionnaires were checked against the sampling frame to ensure that a full census was undertaken. The survey was then sent by Royal Mail.

❖ **CONSUMER SAMPLE**

The consumer survey was to be undertaken through interviewer-administered questionnaires. The interviewers consisted of mature students: 2 females and 3 males, who were between the ages of 22 and 33. The interviewers originally assisted in focus groups during January and February 1998. Therefore, before interview training (during March 1998) they already possessed an underlying understanding of the project. The training consisted of mock interviews and discussions concerning interviewer bias, following Market Research Society guidelines.

5.4 OVERVIEW OF ANALYSIS AND STRUCTURE OF RESULTS

The results of the empirical research are detailed in chapter 6. The techniques employed to analyse the data are outlined below.

Figure 5.13 Summary of Statistical Analysis Implemented and Structure of Results

Results	Analyses Implemented
Naturally Coloured Wool Scale Development and Validation	Content validity Reliability Analysis
Results of Survey	Summary and descriptive statistics Exploratory Factor Analysis Analyses of Variance

- **THE USE OF APPROPRIATE STATISTICAL TESTS**

Both non-probability and probability techniques were applied in this study due to the difference in sample sizes. In order for the results of a survey to be generalisable, to enable inferences of projections to be made, probability techniques should be conducted. Within this research design a probability technique (census) was applied for the textile supply chain and for the consumer survey a non-probability quota sample. Although a non-probability quota was implemented a subsequent random selection of shoppers on the High Street and shopping malls occurred. Parametric

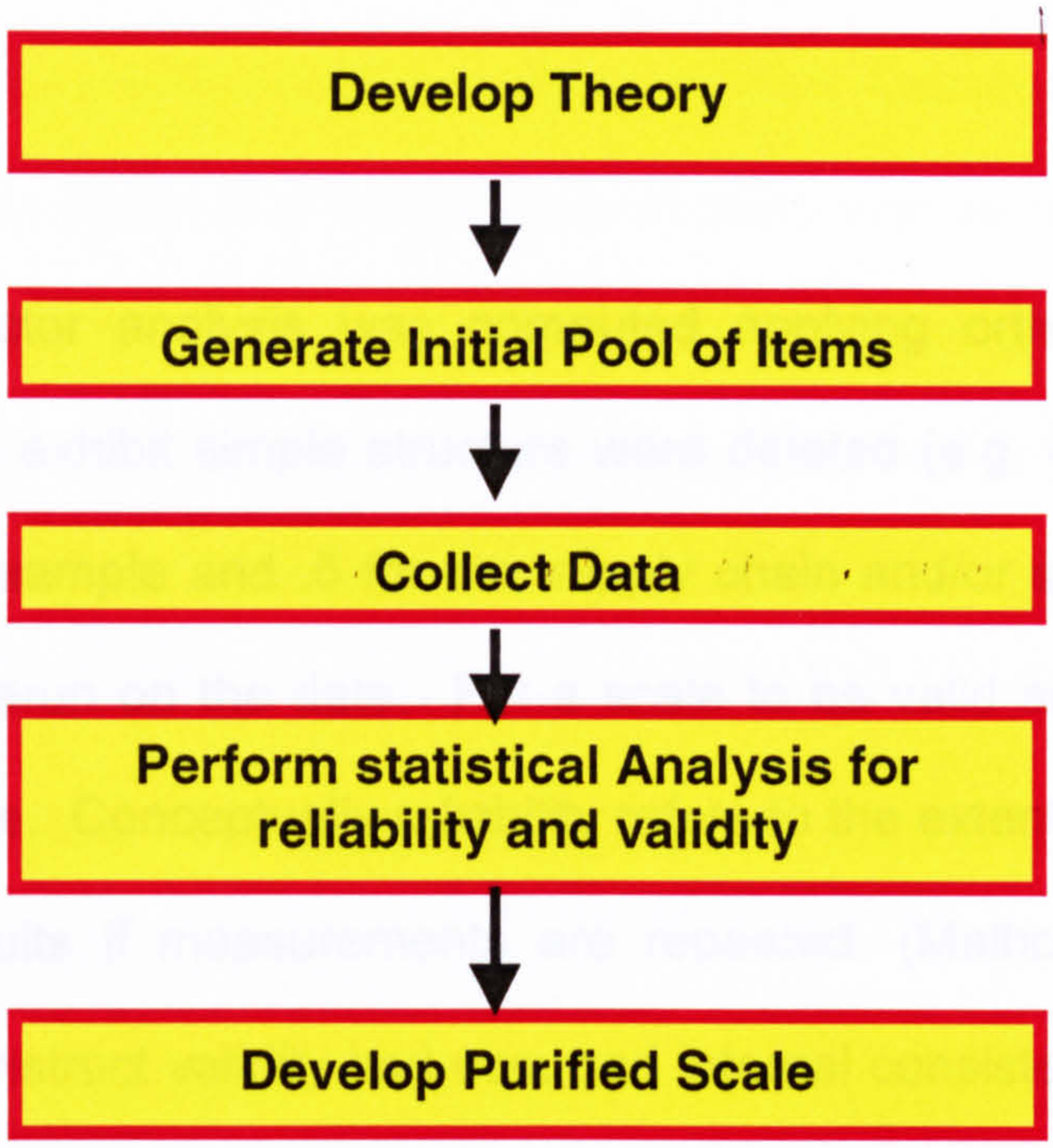
tests allow inferences to be drawn from such a sample (Malhotra, 1999; Hair et al, 1998). The central limit theorem states that the means will be normally distributed for large samples even if the underlying values are not (Hair et al, 1998). As a result parametric tests can be computed on large non-random samples (Townsend, 1990). Parametric tests (e.g. factor analysis) were deemed appropriate to apply to both the textile supply chain and consumer samples. Factor analysis was an appropriate technique for exploring the perceptions and image of naturally coloured wool. Exploratory factor analysis addresses the problem of analysing the structure of relationships within items and by summating the data, is an aid to conceptualisation (Hair et al, 1998).

- **STATISTICAL TECHNIQUES FOR SCALE DEVELOPMENT AND VALIDIATION**

The purpose of any particular measurement instrument is to estimate the scale that would be obtained if all the possible items in the domain of a construct could be identified and utilised (Nunnally, 1967).

The first major output of this research was the creation of two scales: supply chain relationship marketing, and perceptions of naturally coloured wool. Several sources outline scale development procedures (Malhotra, 1999; Hair et al, 1998; Churchill, 1999; Chisnall, 1997).

Figure 5.14 Development of a Multi-item Scale
Adapted from Malhotra, 1999



After the theory was developed, the initial pool of items was generated and assessment of the scales by industry and marketing experts were implemented. The starting point for creating a scale is its conceptual definition as this specifies the theoretical basis for the scale. Before detailed analysis of the scales could take place, it was necessary to ensure content validity (face validity). To this end, expert judges from both within the textile industry and marketing, subjectively assessed the correspondence between the items to be included in the scales. (Hair et al, 1998). Once this had been confirmed it was then necessary to consider the reliability of the items.

Once the empirical research had been undertaken the scales were then purified using exploratory factor analysis and an examination of item-to-total and inter-item correlation.

Exploratory factor analysis was computed applying orthogonal rotation (varimax). Items failing to exhibit simple structure were deleted (e.g. loadings of less than .4 for the consumer sample and .5 for the supply chain and/or split loadings). Then factor analysis was rerun on the data. For a scale to be valid and to possess practically it must be reliable. Conceptually reliability refers to the extent to which a scale produces consistent results if measurements are repeated. (Malhotra, 1999). Therefore, to ensure that construct validity had occurred internal consistency had to be verified. To measure the internal consistency of the scales coefficient alpha was computed.

Broadly speaking there are two types of reliability (test-retest and internal consistency) as well as several diagnostic measures such as reliability coefficients (Malhotra, 1999; Hair et al, 1998). One of these techniques, Cronbach's Alpha was then applied to the scale items, as this is the most widely accepted measure of reliability (Churchill, 1999; Hair et al, 1998, Nunnally, 1978). The alpha coefficient identifies items with lack of correlation with other items in the proposed summated scale, which suggests that they should not belong to the summated scale and should be omitted. The variable varies from 0 to 1, where zero implies complete unreliability and 1 suggests perfect reliability. Scores of 0.7 or above are recommended as the accepted minimum threshold for reliability (Peterson, 1994, Nunnally, 1978).

Conceptually, reliability is defined as 'the degree to which measures are free from error and therefore yield consistent results' (Peter, 1979). To measure the reliability of the multi-item scales coefficient alpha was computed (Cronbach, 1951). Peterson (1994) provides a meta-analysis of magnitudes of coefficient alpha obtained in social science research. The meta-analysis exhibits the mean values obtained for different levels of the research design characteristics, and can be used for comparison purposes. As shown in Figure 5.15, each of the scales possessed an alpha of over .7, which meets the minimum requisite for the research design used as laid out by Peterson (1994).

Figure 5.15 Coefficient Alpha for all Scales across the Supply Chain

Scale	Total	Farmer	Wool Buyer to Retailer	Consumer
Naturally Coloured Wool	.7243	.8288	.8180	.7243
Product Image	.8550	.7584	.7797	.7379
Relationship Marketing	.8886	.8716	.7018	X

Although outside the scope of this research the next stage of the scale development would be to consider construct validity which addresses the question of what construct or characteristic the scale is measuring (Hair et al, 1998). The widely accepted forms of validity are convergent validity (which assesses the degree to which two measures of the same concept are correlated) and discriminant validity (how two conceptually similar concepts are distinct (Hair et al, 1998). Convergent and discriminant validity could be tested simultaneously by exploratory factor analysis. This survey could then be repeated in the future to assess the construct validity of the scales.

- **STATISTICAL ANALYSIS OF THE NCW SURVEY**

The results of the survey are divided into four sections, which are detailed in chapter 6. The first being a discussion of the sector specific questions, with each sector being detailed in turn. As previously stated, a census of the industry was undertaken while the consumer profiles were compared with the sample quotas and with national published statistics to determine the level of representativeness of the sample.

During the second stage, factor analysis was computed on the three scales under investigation. A cross supply chain analysis was then undertaken to ascertain similarities and differences in perceptions. Stage three consisted of the analysis of areas, such as, purchase decision involvement which were not included within the factor analysis and were compared across the supply chain. The final stage of the analysis was applying the results from stage one to three of the conceptual textile systems model to establish whether the three-dimensional pyramid varied in shape and size across the supply chain.

5.5 CHAPTER SUMMARY

Chapter Five presents the methodological framework undertaken in this research which applied the traditional approach of discussing the hypotheses and propositions, the research prerequisites, design and an overview of the structure of the results. The discussion provided an insight into the analysis of brand image across the supply chain. The research approach undertaken was that of a systems perspective in marketing which resulted in the hypotheses and propositions being tested using both qualitative and quantitative data.

The main empirical instrument applied was a mail questionnaire to industry by census and an interviewer questionnaire to general consumers by quota sample in widely dispersed geographical locations. The scales applied within the empirical instrument was generated through previously identified techniques with both the scales and sample size and population tested for reliability and validity. Finally, the chapter concluded by providing an outline of the types of statistical analysis and their justifications for use, which will be undertaken in Chapter Six.

5.6 REFERENCES

Assael, H., (1998), *Consumer Behaviour and Marketing Action*, 6th edition, South Western College Pub., Cincinnati Ohio.

Babin, L., (1994), Guidelines for the state-of-the-art scale development, Journal of Consumer Research, 21 (2) pp 198 – 201.

Bearden, W. O., Netemeyer, R, G., Mobley, M. F., (1993), Handbook of Marketing Scales: Multi-Item Measures for Marketing and Consumer Behaviour Research, Sage, London.

Bilton T., Bonnett K., Stanworth M., Sheard K., Webster A., (1985*), Introductory Sociology*, 2nd Ed., edited by A Giddens, Macmillan Press Ltd, London.

Chisnall, P. M., (1997), *Marketing Research*, 5th Ed, McGraw-Hill, London.

Churchill, G. A., (1999), *Marketing Research: Methodological Foundations,* Dryden Press, Fort Worth.

Churchill, G. A., (1979), A paradigm for developing measures of marketing constructs, Journal of Marketing Research, XVI, (Feb) pp 64 –73.

Colwell, J., (1990), Qualitative Market Research: A Conceptual Analysis and Review of Practitioner Criteria, *Journal of Market Research*, 32,1, pp 13-36.

Cooper, P., Branthwaite, A., (1977), Qualitative technology: New Perspectives on Measurement and Meaning through Qualitative Research, *The Market Research Society Conference* .

Cronbach, L.,J., (1951), Coefficient Alpha and the Internal Structure of Tests, *Psychometrika*, 16 Sept, pp 297-334.

De Chernatony, L., McDonald, M.,(1992), *Creating Powerful Brands,* Butterworth/Heinemann, Oxford.

De Ruyter, K., (1996), Focus versus nominal group interviews: A comparative analysis, *Marketing Intelligence and Planning*, 14/6 pp 44-49.

Fashion Guide – International Designer Directory, (1995), Fashion Guide International, New York.

Flood, R., L., (1991), *Creative Problem Solving: Total Systems Intervention,* John Wiley, Chichester, New York.

Ghauri, P., Gronhaug, K., Kristianslud, I., (1995), *Research Methods in Business Studies: A Practical Guide*, Prentice-Hall.

Glaser, B.,G., (1992), *Basics of grounded theory analysis*, Mill Valley, C A Sociology Press.

Greenbaum, T., L., (1993), *The Handbook for Focus Group Research*, Maxwell Macmillian, New York.

Hair, J., F.; Anderson, R.,E.; Tatham, R.,L; Black, W.,C.,(1998), *Multivariate Data Analysis*, 5th edition, Prentice Hall, New Jersey.

Hankinson, G.; Cowking, P., (1993), *Branding in Action: Cases and strategies for profitable brand management*, McGraw Hill, Maidenhead.

Jarrett, D., G., (1996), A comparison of two alternative interviewing techniques used within an integrated research design: a case study in outshopping using semi-structured and non-directed interviewing techniques, *Market Intelligence and Planning*, 14/6, pp 6-15.

Jick, T., D., (1983), Mixing qualitative and quantitative methods in Van Maanen (ed) *Qualitative Methodology*, Sage, London

Judd, C. M., Smith E. R., Kidder, L. H., (1991), Research Methods in Social Relations, 6th edition, Harcourt Brace.

Kendale Textile Industry Directory, (1998), 14th edition, Longwood, Huddersfield.

Kinnear, T., Taylor, J.,R., (1996), *Marketing Research: An applied approach,* McGraw-Hill, London

Malhotra, N.K., 1999, Marketing Research: An applied orientation, 3rd edition, Prentice-Hall International, New Jersey.

Mc Daniel C., Gates R.(1995), *Contemporary Marketing Research*, West, New York.

Mittal, B., (1989), Measuring Purchase-Decision Involvement, in Bearden et al, (1993), *Handbook of Marketing Scales: Multi-item Measures for Marketing and Consumer Behaviour Research*, Sage, London.

Nunnally, J.C., (1967), *Psychometric Theory*, Mc Graw Hill Book Company, New York.

Nunnally, J.C., (1978), *Psychometric Theory*, 2nd ed Mc Graw Hill Book Company, New York.

Oppenheim, A.N., (1992), *Questionnaire Design, Interviewing and Attitude Measurement*, Pinter, London.

Peter, J.P., (1979), Reliability: A Review of Psychometric Basics and Recent Marketing Practices, *Journal of Marketing Research*, 16 (Feb), pp 6 – 17.
Peterson, R. A., (1994), A meta analysis of Cronbach's alpha, Journal of Consumer Research, 21, (Sept), pp 381 – 391.

Retail Directory of the UK, (1998), assistant editor Hancock, C., Newman Books Ltd., London.

Sheth, J. N.; Gardner, D. M.; Garrett, D.E., (1988), *Marketing Theory: Evolution and Evaluation*, John Wiley & Sons, Canada.

Skyes, W., (1990), Validity and Reliability in Qualitative Market Research : A review of the literature, *Journal of Market Research Society*, Vol. 32 no 3, pp 289-328.

Spector, P. E., (1992), Summated Rating Scale Construction: An Introduction, Sage.

Strauss, A., Crobin, J., (1998), *Basics of Qualitative Research: Grounded Theory Procedures and Techniques*, 2nd edition, Sage, London.

Threlfall, K. D., (1999), Using focus groups as a consumer research tool, Journal of Marketing Practice: Applied Marketing Science, Vol. 5, Issue 4.

Townsend, J.,T., (1990), Truth and Consequences of ordinal differences in statistical distributions: Towards a theory of hierarchical reference, *Psychological Bulletin*, 108, pp 551-569.

Will, V., Eadie, D., MacAskill, S., (1996) Projective and Enabling Techniques Explored, *Marketing Intelligence and Planning*, 14/6, pp 38-43.

Wool Trade Directory of the World, (1998), 7th edition, World Textile Publications, Bradford.

Van Maanen, J., (1983), *Qualitative Methodology*, Sage, London.

CHAPTER SIX

6.0 INTRODUCTION

Following the methodological approach outlined in the previous chapter, this chapter discusses the findings of the empirical research. Section one examines the specific areas pertinent to each stage of the supply chain. While section two examines the results of factor analysis relating to the naturally coloured wool image, third party attitudes to wool and supply chain relationships. Section 3 discusses the findings of the combined mean scores on purchase decision involvement, product image, supply chain image, the type of person who buys wool clothing and perceptions of retail outlets selling wool. The chapter concludes by discussing the conceptual model taking into consideration the previous findings. The empirical research was composed of six equivalent questionnaires. After the data had been scrutinised for completion and input errors the following detailed analysis was undertaken: -

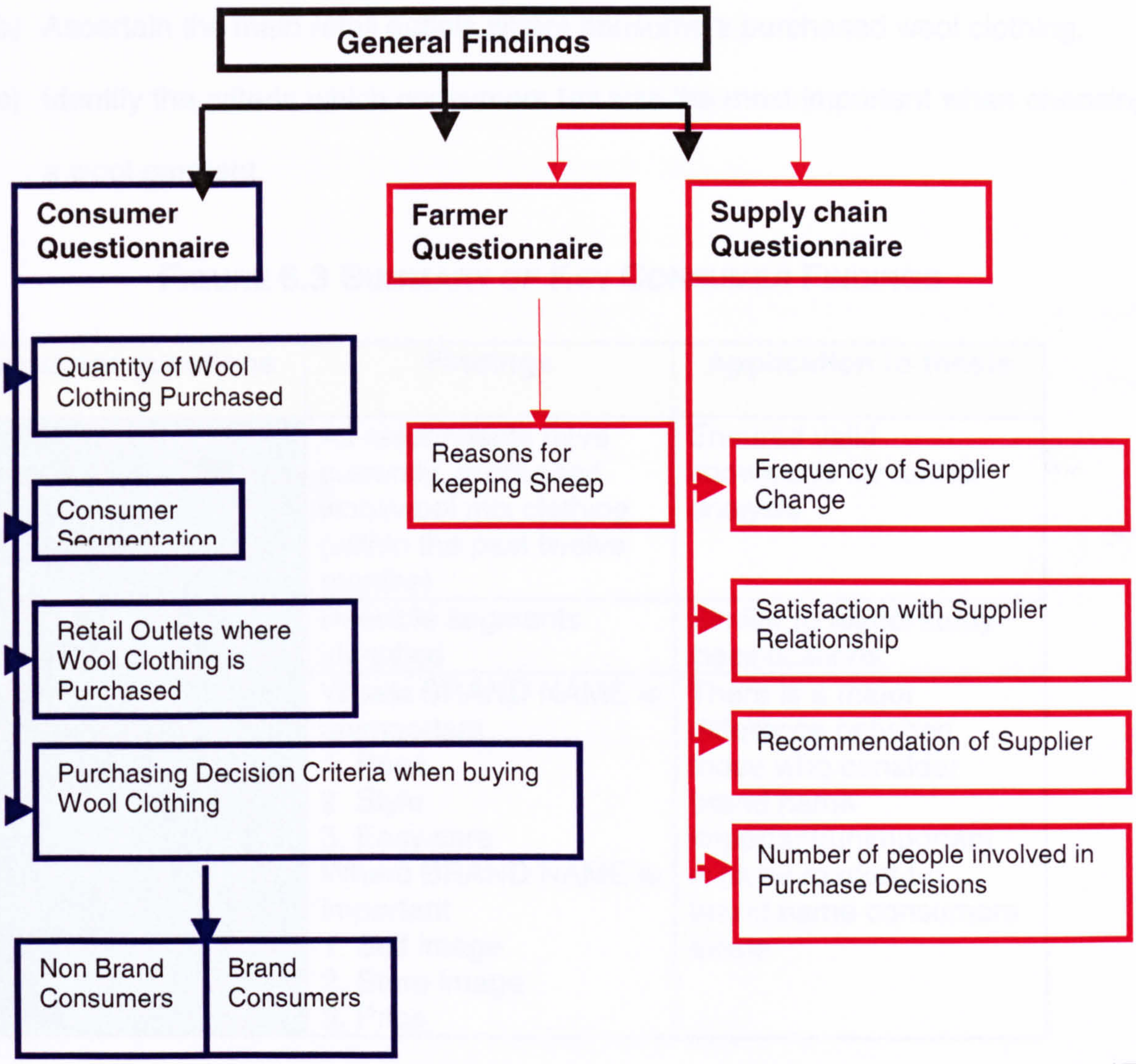
FIGURE 6.1 TECHNIQUES APPLIED DURING ANALYSIS

	Supply Chain Survey					
Analysis Performed	**Farmer**	**Wool Buyer**	**Processor**	**Manufacturer**	**Retailer**	**Consumer**
Section 1 Identification of Issues	General trend analysis	General trend analysis	General trend analysis	General trend analysis	General trend analysis	General trend analysis
	Presentation of individual question findings in Appendix C					
Section 2 Data Reduction	Factor analysis Factor Mean score	Factor Mean score	Factor Mean score	Factor Mean score	Factor Mean score	Factor analysis Factor Mean score
	Graphical presentation of factor mean scores for trend analysis					

6.1 SPECIFIC SUPPLY CHAIN SECTOR QUESTIONS

This section discusses findings pertinent to the sector specific questions from the supply chain questionnaires and is summarised in Figure 6.2. To be marketing focused it is usual to firstly consider the views of consumers. Therefore, the discussion commences with an examination of the consumer sample to enable the reader to be able to understand the end user before considering the industry point of view.

FIGURE 6.2 SECTION 1 OUTLINE



- **CONSUMER SURVEY RESPONSES**

The consumer analysis allowed a detailed breakdown of responses to two specific questions. These were to: -

1. Identify the percentage of wool clothing purchased, to validate the consumer responses.
2. Identify possible market segments for naturally coloured wool:
   a) Identify the consumer demographics of wool clothing purchasers.
   b) Ascertain the main retail outlets where consumers purchased wool clothing.
   c) Identify the criteria which consumers felt was the most important when choosing a wool garment.

FIGURE 6.3 SUMMARY OF KEY CONSUMER FINDINGS

Consumer questions	Findings	Application to thesis
% wool clothing purchased	All respondents have currently purchased wool/wool mix clothing (within the past twelve months)	Ensured valid knowledge for further analysis
Identification of market segments	Possible segments identified	Similar to Mintel study classifications
Criteria for wool clothing purchase	Where BRAND NAME is unimportant 1. Price 2. Style 3. Easy care Where BRAND NAME is important 1. Self image 2. Store image 3. Price	There is a major difference between those who consider brand name important/unimportant A niche market for brand name consumers exists

The findings highlighted in Figure 6.3 suggest there is a market niche, certainly for people who have experience of wool clothing purchases amongst existing consumer categories.

- **WOOL CLOTHING PURCHASED**

The results of the consumer data (shown in Appendix C) highlighted the following points: -

1. Women purchase more wool mix clothing than men.
2. Women purchase more 100% wool clothing than men.
3. Men purchase similar percentages of wool over all income groups.
4. 32% of the sample do not purchase 100% wool clothing.
5. Only 11.2% of the sample purchased more than 50% of their clothes in 100% wool.

Perhaps the important finding from this information is the fact that a large percentage of respondents who purchased wool mix clothing. For naturally coloured wool production, mixing the fibre with other constituent parts would assist in the 'easy care' of the garments and due to the limited quantity of fibre allow more clothing to be produced. However, by mixing naturally coloured wool with other fibres the 'purity' of the naturally coloured wool image could be tainted. Further research should be undertaken to uncover whether this is significant for this market.

- **JOINT INCOME**

The analysis of 100% wool clothing purchased by joint income identified that 55% of the sample, which purchased, 100%wool clothing were within the income range of £10,000 - £30,000. Of this sub group only 10% purchased more than 50% of their clothing as 100% wool.

The data implies that this is a non random sample as the levels of income are towards the upper end of the joint income categories with 65% of those sampled who purchased earning over £20,000 per annum (see Appendix C).

The findings suggest that as people earn more they proportionately purchase more wool mix clothing, rather than 100% wool clothing. This has a major implication for the future marketing of 100% wool clothing products. Further research is recommended to identify if this trend is wide spread throughout the UK consumer population.

- **RETAIL OUTLETS WHERE WOOL CLOTHING IS PURCHASED**

The top ten retail outlets for the purchase of wool clothing, characterised by age, are shown below: -

FIGURE 6.4 FREQUENCY TABLE OF RETAIL OUTLETS BY AGE RANGE

Shop Name		Age					
		11 – 20	21 – 30	31 – 40	41 - 50	51 – 60	61 +
Marks & Spencer	1	24	45	57	41	32	24
Next	2	51	48	28	13	7	2
River Island	3	57	55	19	11	1	0
BHS	4	10	18	26	23	12	17
C & A	4	15	15	30	22	10	16
Top Shop	6	54	39	0	3	0	0
Mail Order	7	12	17	22	13	8	16
John Lewis	8	9	19	25	11	14	9
Local Market	9	12	15	12	13	8	19
Principles	10	12	22	15	13	5	6

Apart from River Island and Top Shop, the top 10 retailers are frequented by all age groups; indicating a broad appeal either in personal shopping or shopping with/for others. It should also be noted that across all age ranges that mail order shopping is still very prevalent. Given the current trend in internet shopping this offers retailers a segment of the market who are currently happy with and have a tradition of having products delivered for trial at home. This could offer an opportunity for naturally coloured wool farmers to become involved in later stages of production marketing their products to end consumers, thus by passing the traditional supply chain. Even though,

C & A was the 4th ranked frequented retail outlet for purchasing wool clothing by this research, it should also be noted that early in 2000 C&A announced its closure due to falling profits.

❖ GENDER

There were no surprising results from the analysis of retail outlets (see Appendix C). The proportion of the top 10 ranked stores by gender is 2:1 for females (the survey bias is 2:1 females to males) for the shops frequented. It should be noted that only men had purchased wool clothing within the past twelve months in Top Shop, this could be a separate niche market for naturally coloured wool clothing.

❖ CRITERIA IMPORTANT TO YOU WHEN PURCHASING WOOL CLOTHES

Findings from the in-depth interviews across the supply chain suggested that brand name and self-image of the consumer were amongst the most important factors when purchasing wool clothing. However, the empirical research findings identified a significantly different set of criteria between those who considered brand name as the most important (15% of the sample), and those who did not (85% of the sample).

❖ NON BRAND CONSUMERS

For 79% of the consumer sample the most important factor when selecting wool clothing was price, followed by style and easy care of garments (see Appendix C). The third criterion is especially important for wool clothing as many still see wool as

hand wash only. During the focus group, discussions with consumers' similar views were expressed that in today's hectic lifestyle most people prefer clothes that can be machine-washed and tumble dried. Image and brand criteria were ranked eight and tenth respectively for this group.

❖ BRAND NAME CONSUMERS

The criteria were re-run for those who selected brand name as their number one choice. Figure 6.5 illustrates the new criteria listing. It can be seen that for these consumers self-image is the second most important criteria, followed by store image. Price however, is the fourth most important criteria; thus, showing that for those who are interested in brand names they are concerned about image above all other aspects. On the positive side these people are not concerned about the difficulties of garment care, therefore the extra care that some woollen garments require would not prevent a purchase. On a less positive note, being environmentally friendly is the lowest ranked criteria marginally exceeded by advertising. This could have repercussions for the natural coloured wool industry, as the environmental tag is one platform that may be applied within advertising to educate consumers. If these groups of consumers are not particularly concerned about either of these criteria then they may be unresponsive to any advertising campaign emphasising

the naturalness of the product.

FIGURE 6.5 SUMMARY TABLE OF CRITERIA WHEN SELECTING WOOL CLOTHING

Criteria	No of PEOPLE whose PREFERENCE = 1 Was BRAND NAME	Criteria	No of PEOPLE who selected BRAND PREFERENCE TOTAL 135
Brand name	46	Brand name	135
Self image	46	Style of clothing	82
Store image	39	Price	79
Price	35	Self image	77
Style of Clothing	30	Store image	56
Reason for buying the clothes	20	Purpose for buying clothes	44
Colour of garments	16	Reason for buying clothes	40
What it is made off	13	Colour of garments	39
Purpose for buying clothes	11	What it is made off	35
Weather expected	11	Easy care	25
Advertising	11	Weather expected	16
Easy care of garment	8	How difficult it is to wash	13
How Difficult it is to wash	4	Advertising	13
Environmentally Friendly	3	Environmentally Friendly	4

Figure 6.5 illustrates a comparison of those who ranked brand name as their 1st choice, with those that ranked it between 1 and 5 in their selection criteria list. The findings from this group of consumers has identified an important subgroup of those whose main preference is brand name that are more influenced by style and price than any other criterion. Furthermore, this group is also more interested in advertising than those who did not select brand name in their purchasing criteria.

- **SUPPLY CHAIN RESPONSES**

The supply chain analysis allowed a detailed breakdown of responses to three main areas. These were to: -

1. Identify the reasons that farmers kept naturally coloured wool sheep
2. Clarify those organisations operating within the wool textile system
3. Understand the extent of relationship marketing within the textile supply chain.

Figure 6.6 summaries the key supply chain findings.

FIGURE 6.6 SUMMARY OF KEY SUPPLY CHAIN FINDINGS

Supply chain questions	Section of Supply Chain	Findings	Application to thesis
Reasons for keeping naturally coloured wool sheep	Farmer	Naturally coloured wool farmers primarily keep sheep for their wool properties - not necessarily financial gain	If financial gain is not the major driver, then what other factors may make these farmers collaborate
How often they change suppliers	All sectors except Farmers	55% have permanent supplier relationships	With such a high percentage of permanent relationships there should be an opportunity to gain a 'co-operative' approach to naturally coloured wool
Satisfied with supplier relationship	All sectors except Farmers	All the Wool Processors are satisfied with their supplier relationship BUT 90% of both manufacturers and retailers are **unsatisfied**	The reasons for such dissatisfaction may have a causal effect on buyers' perception of naturally coloured wool. This is outside the scope of this research
Would you recommend your supplier to another	All sectors except Farmers	Only 7.7% of the sample would NOT recommend their suppliers	If 90% of the survey are unsatisfied with their supplier relationships, why do they still recommend them? This may have a causal effect on buyers' perception of naturally coloured wool. This is outside the scope of this research
No of people involved in purchase decision	All sectors except Farmers	For 61% of the sample 3 or more people were involved in the purchase decision	With so many people being involved with the purchase decision there are a large number of causal effects to be considered This is outside the scope of this research

- **FARMERS –**

❖ **REASONS FOR KEEPING NATURALLY COLOURED WOOL SHEEP**

During in-depth discussions (from a sample of naturally coloured wool farmers) those questioned stated that they kept their animals mainly for their wool properties, as previously stated in chapter 2. From the empirical research, 63% of the questionnaire sample agreed or strongly agreed that they kept naturally coloured wool sheep because of their wool properties. Only 10% agreed that they kept these animals because of EU subsidies. Nevertheless, 63% did not agree that they kept these sheep for their carcass price, which is partly the aim of the EU subsidies. Of all the results, however, the most illuminating was the fact that 64% of the sample disagreed that keeping sheep was the only profitable way of utilising that land.

In summary, it can be stated that naturally coloured wool farmers are maintaining their flocks for non profit related reasons. Further research needs to be undertaken to investigate the strength of these perceptions compared with traditional sheep farmers who are concerned about profit, to assess if there are any differences in their marketing application (see Appendix C for details) as well as their willingness to co-operate due to their 'individual lifestyle'.

- **RELATIONSHIP MARKETING WITHIN THE TEXTILE SUPPLY CHAIN**

Results from the analysis into the levels of relationship marketing within the supply chain are detailed below.

❖ **FREQUENCY FOR CHANGING SUPPLIERS**

From the empirical research, 55% of the sample have a permanent supplier relationship, which hypothetically, would allow them the benefits of total relationship marketing (see Appendix C). The retailers however, change 70% of their suppliers within three years. Therefore, it could be suggested that this permanent relationship between 'production' sections of the supply chain, may allow these parties to work together to create a new brand identity for naturally coloured wool. The fact remains that retailers would have to be convinced of the benefits for joining such as scheme. The consequences of which would mean being a party to this 'co-operative grouping' for several years without changing suppliers. Purchasing power for most fmcg has now moved towards the retailer. This trend is currently being mirrored in the textile industry. This fact has had a dampening effect on the textile industry supply chain where many retailers are not particularly interested in ideas from manufacturers (in-depth interviews) and specify exactly their requirements. This could have a major effect on any collaboration between parties in the supply chain to the creation of a brand identity for naturally coloured wool products. For this concept to have any possibility of success retail commitment to the suggested industry collaboration is paramount.

The high level of interdependence amongst the supply chain groups shown is a common characteristic in business to business marketing especially where the industry is fragmented and there is a tradition of long standing contracts and family businesses.

❖ SUPPLY CHAIN SATISFACTION WITH SUPPLIER RELATIONSHIPS

There was a significant split in the satisfaction levels of supplier relationships between wool processors (100% agree they are satisfied) and those involved in the later stage of production (10% agree they are satisfied) (see Appendix C for details). This could partly be explained as wool processors for the most part obtain their fibre from the British Wool Marketing Board or similar global organisations in a symbiotic relationship. Wool processors in general have similar attitudes and goals in relation to the levels of quality and supply for their customers. However, in the later stages of production such as manufacturers and retailers more complex demands come into play such as constantly adapting to customer tastes.

Further investigation is required to identify why there is such a lack of satisfaction in supplier relationships, within the textile supply chain. It is noted that this fact may be a source of limitation if any form of 'co-operation' was attempted within the supply chain.

❖ Recommendation of Current Supplier to Another

A surprising result was obtained to this question considering the previous question findings. Apart from 7.7% of wool processors, 90% of the sample responses stated that they were positive towards recommending their current supplier to a competitor. This could perhaps be for two reasons. The first rather negatively, that they wish their competitors to have similar dissatisfaction with their supplier relationship. Or secondly, that as there are a limited number of providers and their current dissatisfaction although high is for non-critical issues and so they would recommend them.

❖ Number of People involved in the Purchase Decision

From Figure 6.7 it can be seen that as the wool clothing product continues across the supply chain at each stage, more people have an influence over the products purchased for resale. From the point of view of naturally coloured wool this means that all parties in the decision, making process must be made aware of its benefits because the power/influence over the decision of each decision-maker with vary. Also, with so many people involved there would be an indefinite number of casual effects taking place. This means a highly targeted education programme for decision makers is required especially in the retail outlets where 70% of the sample have at least 5 people involved in the final decision and where 60% of retail outlets have a central buying function. Further research is required to identify these causal effects.

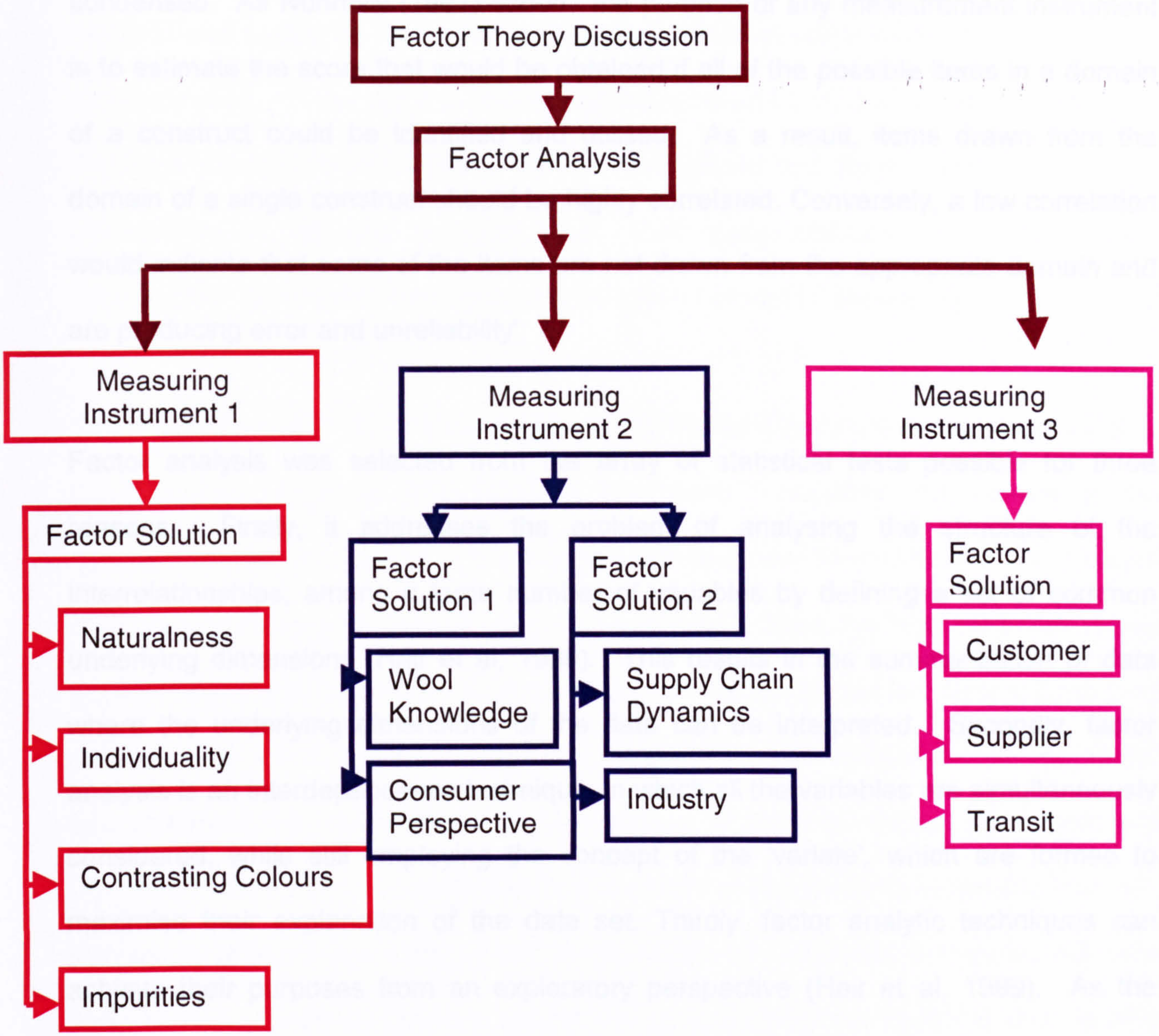
FIGURE 6.7 NUMBER OF PEOPLE INVOLVED IN THE PURCHASE DECISION PROCESS

	Percentage of People involved in the Purchase Decision			
Number of people	Wool Buyers %	Wool Processors %	Manufacturers %	Retailers %
1	28.6	23.1	0.0	0.0
2	42.9	53.8	50.0	10.0
3	0.0	15.4	30.0	10.0
4	0.0	0.0	10.0	10.0
5	28.6	0.0	0.0	70.0
>5	0.0	7.7	10.0	0.0

6.2 DISCUSSION OF THE FACTOR ANALYSIS

This section discusses pertinent findings relating to factor analysis, undertaken on cross supply chain questions. Figure 6.8 defines the structure of this section: -

FIGURE 6.8 SECTION 2 OUTLINE



- **SCALE REDUCTION**

The empirical study produced six data sets each containing approximately 335 variable combinations of data. To provide a deeper understanding of the data it was condensed. As Nunnally (1967) stated, 'the purpose of any measurement instrument is to estimate the score that would be obtained if all of the possible items in a domain of a construct could be identified and utilised. As a result, items drawn from the domain of a single construct should be highly correlated. Conversely, a low correlation would indicate that some of the items are not drawn from the appropriate domain and are producing error and unreliability'.

Factor analysis was selected from the array of statistical tests possible for three reasons. Firstly, it addresses the problem of analysing the structure of the interrelationships, among a large number of variables by defining a set of common underlying dimensions (Hair et al, 1999). This results in the summarisation of data where the underlying dimensions of the data can be interpreted. Secondly, factor analysis is an interdependence technique, in which all the variables are simultaneously considered, while still employing the concept of the 'variate', which are formed to maximise their explanation of the data set. Thirdly, factor analytic techniques can achieve their purposes from an exploratory perspective (Hair et al, 1999). As the underlying philosophy of this research was exploratory, and due to limited number of statistical techniques available, factor analysis was deemed appropriate.

- **FACTOR ANALYSIS DECISION PROCESS**

Applying Hair et al (1999) six-stage model building paradigm, factor analysis was performed on the data sets. The first decision made was that this analysis should be exploratory. In order to satisfy the aim for the second stage of the analysis it was decided to analyse the variables from the data set. The research design for the factor analysis was based on the variable groupings identified within each of the equivalent questionnaires. There were a total of approximately 67 possible variables generated from the empirical study. These scales were placed into three discrete groupings, perceptions of naturally coloured wool, third party attitudes and supply chain perceptions. As a result, each grouping was factor analysed separately.

The response rate from different sectors of the textile supply chain varied, although a representative response was obtained from each. However, for several of the samples, the actual number of responses were less than 50 and thus factor analysis could not be directly performed on these data sets. Given the high response rate a decision was made to perform separately, factor analysis on the farmer and consumer data sets to try to identify underlying dimensions. A comparison of the factor structures was then undertaken. A joint analysis of the other supply chain members was also undertaken. Although the total numbers of respondents were less than 50, the results of the analysis confirmed similar trends to the farmer and consumer data sets. It was, therefore, deemed appropriate to apply both the farmer and consumer factor solutions to the other supply chain members to obtain an holistic supply chain understanding.

To enable a cross supply chain analysis, due to the limitations already stated, it was necessary to impose an external factor solution on all the supply chain sectors. The imposed solution could be either from the farmer or consumer data sets; both are reported and discussed. To achieve this the mean scale score for each factor was calculated for each sample sector of the textile supply chain, to allow a direct comparison of any major perceptual differences across the supply chain. It should be noted that there are limitations in using the mean scale score in analysis. After consideration these limitations were deemed inappropriate to this research.

As the consumer data set consisted of different quota groupings, it was considered important to examine whether the factor solution would be altered between the total consumer or separate sub groups of the data set. Preliminary analyses identified that the major differences in opinions within the consumer data set were as a result of gender issues. In order to test whether gender had a different underlying factor structure, which would result in requiring separate analysis, a factor analysis was performed for each gender, and for the consumer data set as a whole. Where there were no differences within the structure the combined consumer factor loadings were applied. If differences were identified then both the gender structures were applied across the supply chain. Similarly with the farmer data set, factor analysis was firstly performed separately on the 'Shetland' and the coloured sheep breeder's data sets. As the structures identified were identical, the combined farmer structure was applied throughout the analysis.

Exploratory factor analysis was computed, utilising an orthogonal rotation (varimax). Items failing to reach significance or exhibit simple structure were deleted (e.g. loadings less than .4 and or/split loadings) and factor analysis rerun on the data. In order to ensure both the appropriateness and the degree of interrelations between the variables two tests were performed. The first, the Bartlett test of sphericity was applied to the data sets. This test provides the statistical probability that the correlation matrix has significant correlation's (Hair et al, 1999). All the factor structures identified proved to be appropriate. The second test to identify the measure of sampling adequacy was also produced results within the guidelines (Hair et al, 1999).

- **FACTOR RESULTS**

The following section discusses the results from the factor analysis, a summary of the results can be seen in Figure 6.9.

FIGURE 6.9 SUMMARY OF FACTOR ANALYSIS FINDINGS

Research Theme	Findings Factor Solutions	Named factors	Results of mean scale score comparison	Application to thesis
Individual attitudes to naturally coloured wool	A four factor solution was generated, with similar structures between male, female and farmers	Naturalness Individuality Colour Impurities	Positive connotations – except for retailers Consistent trend across supply chain Difference of opinion between farmers/retailers and the others Consistent view ncw is not seen as impure	Consumers understand this concept, so this can be applied in the branding strategy Similar views of the type of person who would wear wool clothing (validating findings in section 1) Consumers have a limited interest in colour This is not an issue for this product
Third person perceptions of wool clothing	Two, two factor solutions were created. There were NO similar structures between the data sets	Augmented Product - Wool knowledge Consumer perspective Supply Chain - Supply chain dynamics Industry attractiveness	Similar finding across the supply chain Positive findings to a 3rd person buying wool clothing Strong positive relationship across the supply chain Positive attitudes to running a smallholding	Everyone has some knowledge of wool properties Further research to identify why there is a difference between someone else and myself when purchasing? There is some form of relationship marketing taking place Needs to be considered with earlier farmer comments
Development of relationships within the supply chain	A three factor solution was generated	Consumer Supplier Transit	Strong agreement across the supply chain Findings show the importance of supplier issues Divergence of opinion across the supply chain	The importance of the customer can be seen throughout the supply chain Evidence of some form of relationship marketing taking place Further research is necessary to identify why there is such a divergence of opinion

- **INDIVIDUAL ATTITUDES TO NATURALLY COLOURED WOOL**

The initial analysis produced a five-factor solution. Further analysis was performed reducing the data into four factors for both the consumer and farmer data sets. Each factor (in the four-factor solution) contained at least two variables, with substantially more variables being located in similar factors between the data sets (see Appendix C for an example factor solution matrix). This solution provided an explanation for 66% of the farmer solution and 64% of the consumer solution for extracted loadings.

❖ **CONSUMER – MALE VERSUS FEMALE RESULTS**

A separate factor analysis was undertaken for this question separating the male and female consumer responses. The results suggest that for this question the factor variables were the same. The combined consumer factors were, therefore, applied when compiling the mean scale scores.

On consideration of the factor elements the following descriptors were given; 'naturalness', a sense of 'individuality' for the person who wears the garment, the 'colour' aspects of the product and views of 'impurities'. The following text discusses each of these identified factor groupings.

Figures 6.10 to 6.12 summarise the factor solution statistics for the naturally coloured wool scale. The text then examines in-depth each of the factors as applied across the supply chain.

FIGURE 6.10 SUMMARY STATISTICS

	Farmer	Total Consumer
Kaiser-Meyer-Olkin measure	**.784**	**.682**

FIGURE 6.11 PERCENTAGE OF VARIANCE EXPLAINED

	Farmer Data set		Total Consumer Data Set	
FACTOR	**Percent of Variance**	**Cumulative Percentage**	**Percent of Variance**	**Cumulative Percentage**
1	**31.523**	**31.523**	**22.878**	**22.878**
2	**14.653**	**46.177**	**20.231**	**43.108**
3	**11.038**	**57.215**	**11.960**	**55.068**
4	**8.530**	**65.745**	**9.264**	**64.332**

FIGURE 6.12 FACTOR SCORES FOR THE FINAL SOLUTION

	Farmer	Total Consumer
Factor 1	**Naturalness** **.860** **.806**	**Naturalness** **.793** **.705** **.647** **.643**
Factor 2	**Individuality** **.817** **.812** **.749** **.688** **.657**	**Individuality** **8.16** **7.61** **.742**
Factor 3	**Colour** **8.12** **.610**	**Colour** **.808** **.744** **.715**
Factor 4	**Impurities** **.817** **.751**	**Impurities** **.834** **.817**

- **NATURALNESS**

Discussion on the factor solution

This factor combined three of the question elements: - original colour of a sheep, the natural look of a product and the fact that this type of garment would not need commercial dyes for colouring. The creation of this factor solution is important because one of the distinctive elements of these wool garments would be marketing the naturalness of the product. The wording of the term naturally coloured wool brings forth connotations of these differentiating facets, for example, not being chemically dyed to achieve a specific colour.

The fact that the analysis did place these elements in the same structure supports the hypotheses that 'consumers' can understand the term naturally coloured wool and as such this descriptor could be applied within the labelling of wool clothing.

Factor solution applied to the supply chain

Figure 6.13 illustrates the mean scale scores for the entire supply chain when applying the 'naturalness' factor structure for both the total consumer and farmer factor solutions. A similar pattern of perceptions to wool clothing can be seen regardless of the factor solution applied. The major discrepancy within the supply chain occurs at the retailer stage. If retail buyers do not agree that naturally coloured wool can be seen as natural, and since they are the major power in the textile supply chain, their positive views on the product are extremely important.

If co-operation at any level across the supply chain is to take place then it will be important to positively change the retail buyers' perceptions to ensure a place in the market for naturally coloured wool clothing. This is an important finding for the research as it shows that within this product category the term naturalness has positive connotations with the general public and that only the retail buyers require to be convinced to change their opinion.

Figure 6.13
Mean Scale Scores for 'Naturalness'

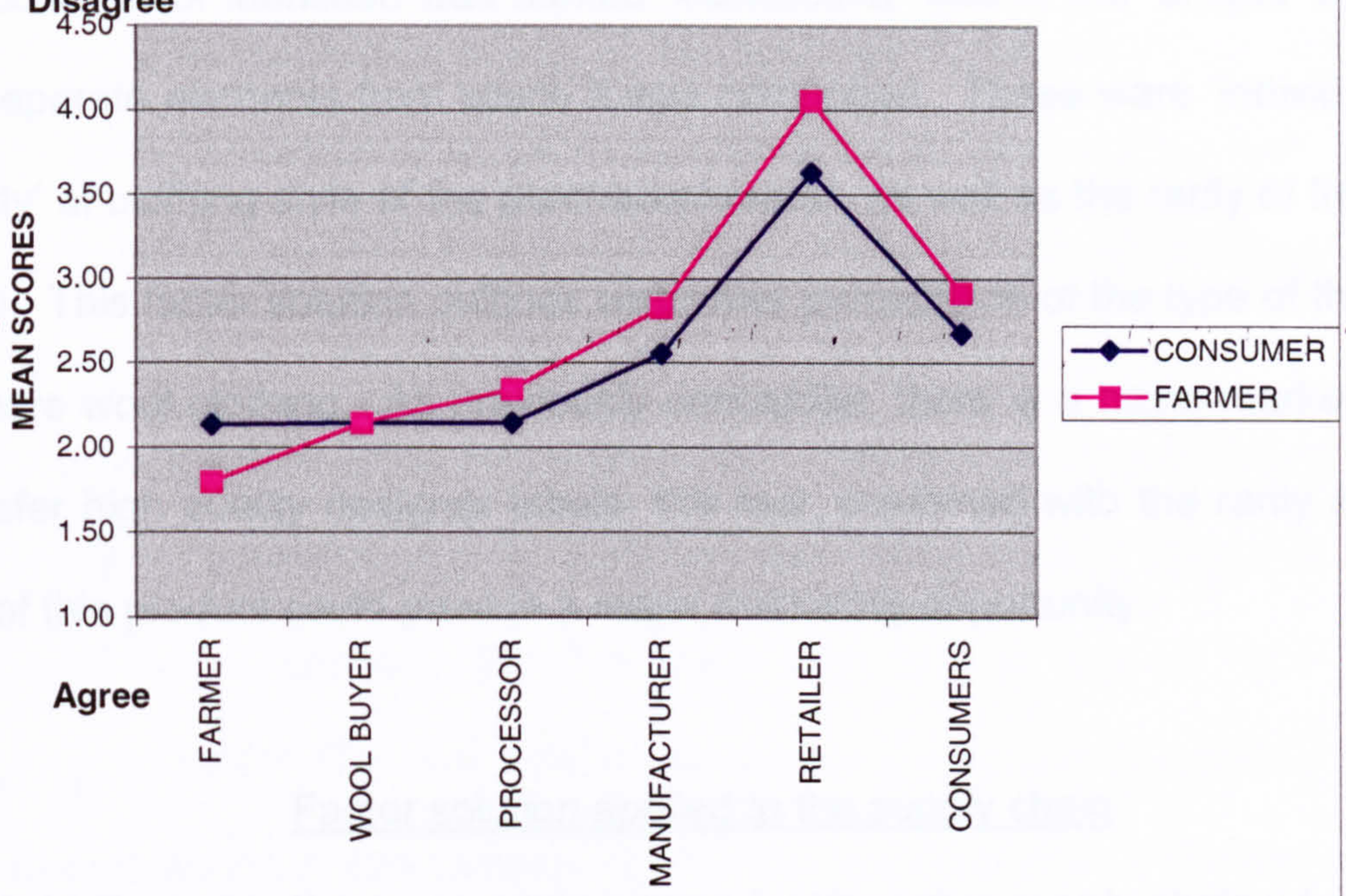
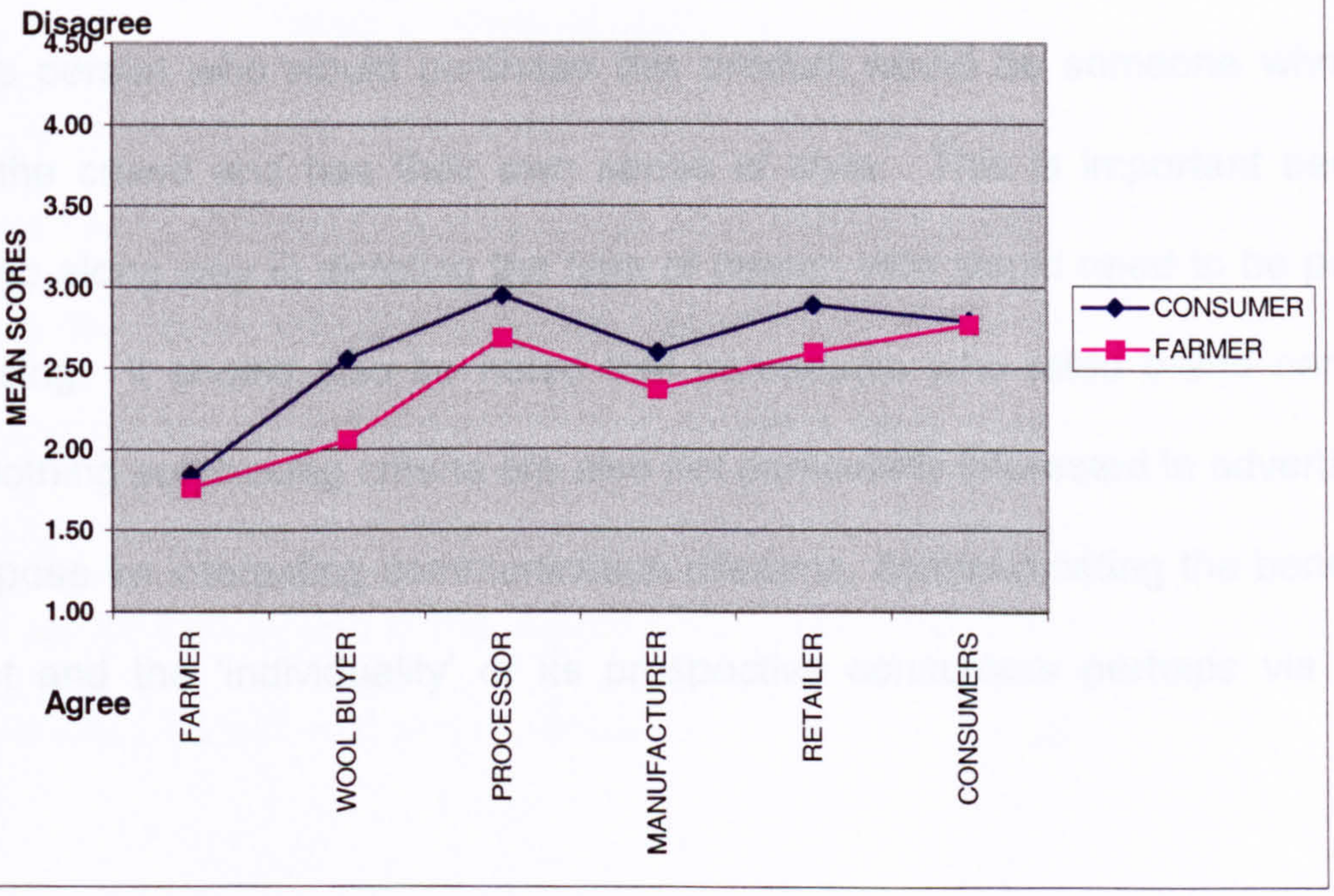


Figure 6.14
Mean Scale Scores for 'Individuality'



- **INDIVIDUALITY**

Discussion of the Factor Solution

The second factor identified was named 'individuality' due to the 'unique' connotation of the separate elements from which it was composed. These were 'individuality' and 'creativity' of clothing style of the purchaser/wearer, as well as the rarity of the garment material. This factor solution outlines consumer perceptions of the type of third person who wears wool clothing. As previously concluded, there is a niche market for those who prefer high quality designer labels, this fact, combined with the rarity and limited supply of this product could provide a major marketing opportunity.

Factor solution applied to the supply chain

Figure 6.14 illustrates the mean scale scores for the entire supply chain when applying the 'individuality' factor structure for both the total consumer and farmer factor solutions. From the graph, it can be seen that the entire supply chain strongly agrees that the person who would purchase this product would be someone who does not follow the crowd and has their own sense of style. This is important because this would go along way in dictating the type of person who would need to be portrayed in advertising. It should also be noted that purchasers who rated brand name in their wool clothing purchasing criteria are also not particularly interested in advertising. This would pose an interesting communication dilemma, communicating the benefits of this product and the 'individuality' of its prospective consumers perhaps via alternative media.

- **CONTRASTING COLOURS**

Discussion of the Factor Solution

The third factor identified was named 'contrasting colours', as it was composed of elements relating to the actual colour of the wool (for a discussion on 'colour' read chapter 3). In-depth empirical research identified colour (by retail buyers) as one of the most important reasons for a consumer to purchase an item of clothing. From the previous analysis, it can be seen that although colour was a criteria for purchasing clothing for consumers, in fact it only ranked 8th in the reasons for purchasing clothing. In-depth research (see Chapter 2) identified the limited colour range of naturally coloured wool as a concern (for farmers), even though this is also its main differentiating feature. The fact that a factor was generated specifically including colour elements suggest that general consumers are interested in colour and have some understanding of the colour ranges of this product.

Factor solution applied to the supply chain

Figure 6.15 illustrates the mean scale scores when applying the 'contrasting colours' factor structure to the entire supply chain. This analysis suggests that the views held throughout the chain with the consumer and farmer factor structures were strongly similar. Surprisingly, only the farmers and retailers have positive views on this area. This strongly suggests that naturally coloured wool farmers possess very different views on colour than others in the supply chain. They are, however, wrong to assume that the retailers do not hold similar views.

To overcome this difference of opinion it would, therefore, be necessary to improve 'colour' perception and its clothing style possibilities throughout the supply chain. This might take the form of providing educational material on such areas as the appreciation of the yarn and cloth being undyed and the variety of designs, which these colours could provide. From the designer point of view, this could provide an extra challenge to develop interesting patterns and combinations with other natural fibres to create interest in the public at large.

In-depth research within the wool processing industry identified the fact that, curiously black fibre is also overdyed with black dye. The reasoning provided was to ensure a consistent colour throughout the fibre. It is then sold as naturally black wool (see Chapter 2). For specialised naturally coloured wool, this practice would have to be stopped or labels adapted to explain the differences between dyed black and natural black products.

Figure 6.15
Mean Scale Scores for 'Contrasting Colours'

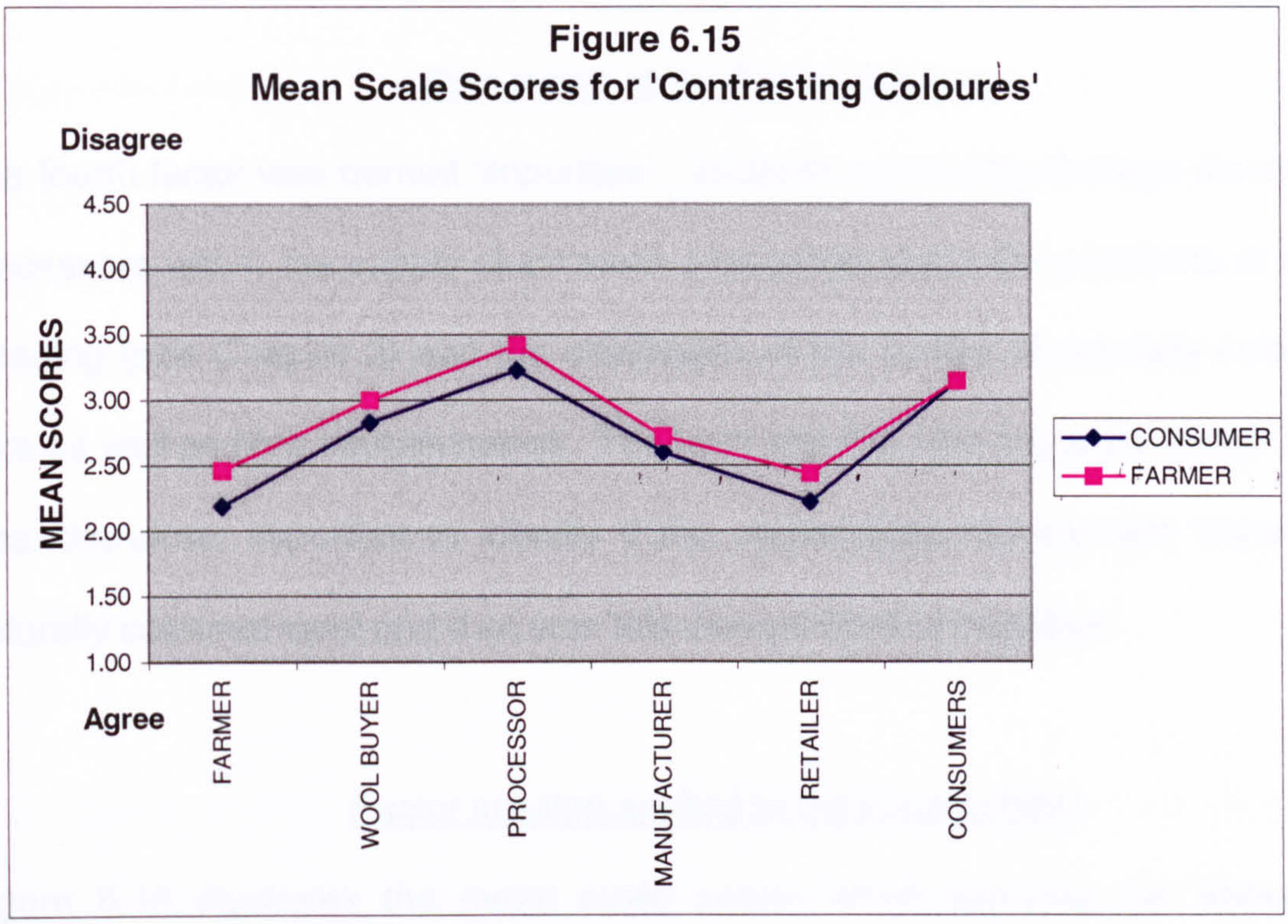
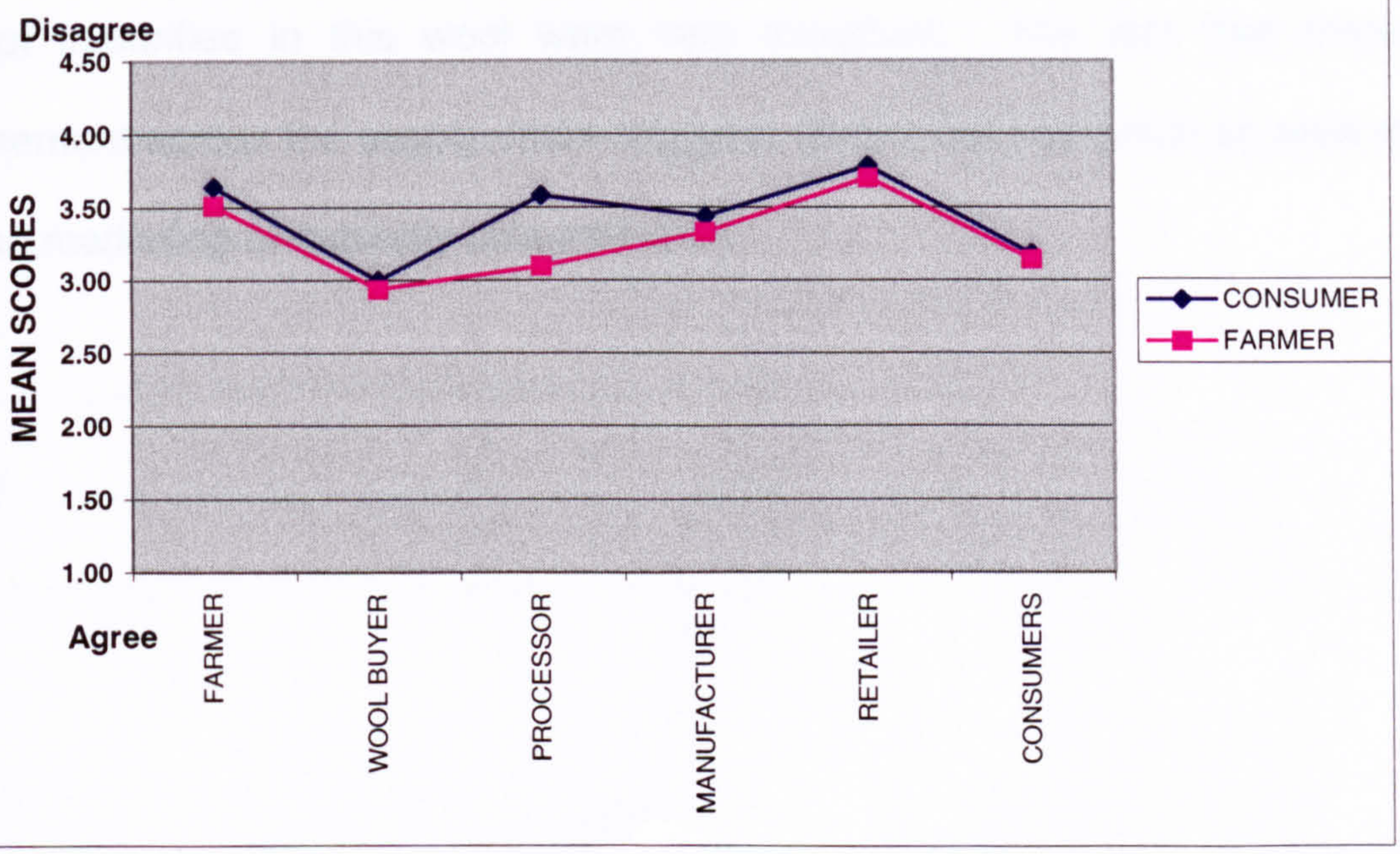


Figure 6.16
Mean Scale Scores for 'Impurities'



- **IMPURITIES**

Discussion of the Factor Solution

The fourth factor was named 'impurities'. In-depth exploratory findings discovered that processors within the supply chain were concerned about the problems of machinery cleaning (see Chapter 2) and the challenges of the quality of naturally coloured wool fibre as well as fibre contamination. The term impurity also suggests being unclean. It was, therefore, important to identify if the respondents did connect 'impurities' with naturally coloured wool and if so was this view positive or negative.

Factor solution applied to the supply chain

Figure 6.16 illustrates the mean scale scores when applying the 'impurity' factor structure to the entire supply chain. The analysis shows that there is a very strong pattern as the entire supply chain do not perceive naturally coloured wool to have impurities. This is a surprising result as in-depth decisions suggested that concerns about impurities in this wool were very important. The fact that there is such agreement across the supply chain suggests that in fact this is not an area of concern in the marketing of naturally coloured wool.

- **MEASURING INSTRUMENT 2 - GENERAL WOOL STATEMENTS**

This question was set to ascertain third party perceptions of the different attributes and branding aspects of wool, as well as related areas in the supply chain. The statements were identified in exploratory research and subsequently tested for inclusion. The initial factor solution identified two distinct structures in the data, the first being those relating to the augmented product, while the second related to the supply chain. As a consequence, a decision was made to separate the statements into their now more identifiable groupings, with the factor analysis being recalculated.

The initial analysis on the augmented product attributes identified a two-factor solution, which explained 56% for the farmer solution and 67% for the consumer solution of the extracted loadings. On consideration of the factor, elements the following descriptors were identified 'wool knowledge' and 'a consumer perspective'. While analysis on the supply chain statements also identified a two-factor solution which explained 54% of the farmer solution and 47% of the consumer solution of the extracted loadings. The factor descriptors for these statements were identified as 'industry attractiveness' and 'supply chain dynamics'

❖ **CONSUMER MALE VERSUS FEMALE RESULTS**

Unlike the previous analysis, this analysis (Figure 6.17) revealed a significant discrepancy between the male and female consumers within the consumer factor

structures. As a compatible set of factor structures could not be found, in order to allow a cross-sectional comparison, the mean factor scores were using farmer, total consumer, male and female factors. As a consequence, the graphs accompanying the next sections show four separate lines.

FIGURE 6.17 SUMMARY STATISTICS FOR PRODUCT ASPECTS

	Farmer	Total Consumer	Male	Female
Kaiser-Meyer-Olkin measure	.545	.620	.616	.710

FIGURE 6.18 PERCENTAGE OF VARIANCE EXPLAINED

	Farmer Data set		Total Consumer Data Set	
FACTOR	Percent of Variance	Cumulative Percentage	Percent of Variance	Cumulative Percentage
1	33.675	33.675	34.160	34.160
2	22.055	55.730	29.507	63.666
	Male Data set		Female Data Set	
FACTOR	Percent of Variance	Cumulative Percentage	Percent of Variance	Cumulative Percentage
1	34.692	34.692	33.348	33.692
2	26.607	61.299	31.649	64.997

FIGURE 6.19 FACTOR SCORES FOR THE FINAL SOLUTION

	Farmer	Total Consumer	Male	Female
FACTOR 1	Wool Knowledge .880 .851 .530	Wool Knowledge .889 .885	Wool Knowledge .854 .848 .578	Wool Knowledge .905 .897
Factor 2	Consumer Perspective .764 .688 .551	Consumer Perspective .844 .681 .579 .483	Consumer Perspective .873 .672 .516	Consumer Perspective .815 .692 .611 .572

- **AUGMENTED PRODUCT FACTOR STRUCTURES – WOOL KNOWLEDGE**

Discussion of the Factor Solution

The first factor placed third party knowledge of wool clothing elements together. This finding suggests that the sample questioned expects 'consumers' to have a knowledge about the properties of wool such as wool warmth and tensile strength, within their buyer behaviour black box. This fact is important because it illustrates a basic level of understanding of wool clothing attributes. As this is the case, it should be reasonably simple to add the additional knowledge of the benefits of naturally coloured wool to consumers' mindsets.

Factor solution applied to the supply chain

Figure 6.20 illustrates the mean scale scores for 'wool knowledge'. It can be seen that there is an extremely strong pattern regardless of the factor structure employed across the supply chain. This trend shows that the respondents believe that third party consumers have a good knowledge of the attributes of wool clothing. For those respondents from within the supply chain, it is suggested that from their employment knowledge of wool they would possess a detailed knowledge of wool clothing attributes. This fact is obviously affecting the level of wool knowledge they perceive general consumers to possess. The surprisingly consistent view is, however, that actual non-industry consumers do not have a detailed knowledge of wool clothing. If, as the findings suggest, non industry consumers do not have a positive knowledge and understanding of wool characteristics, then there is a need to improve this knowledge via educational advertising to increase the possibility of wool clothing purchase.

Figure 6.20:
Mean Scale Scores for Knowledge for Farmer/Total Consumer, Male & Female

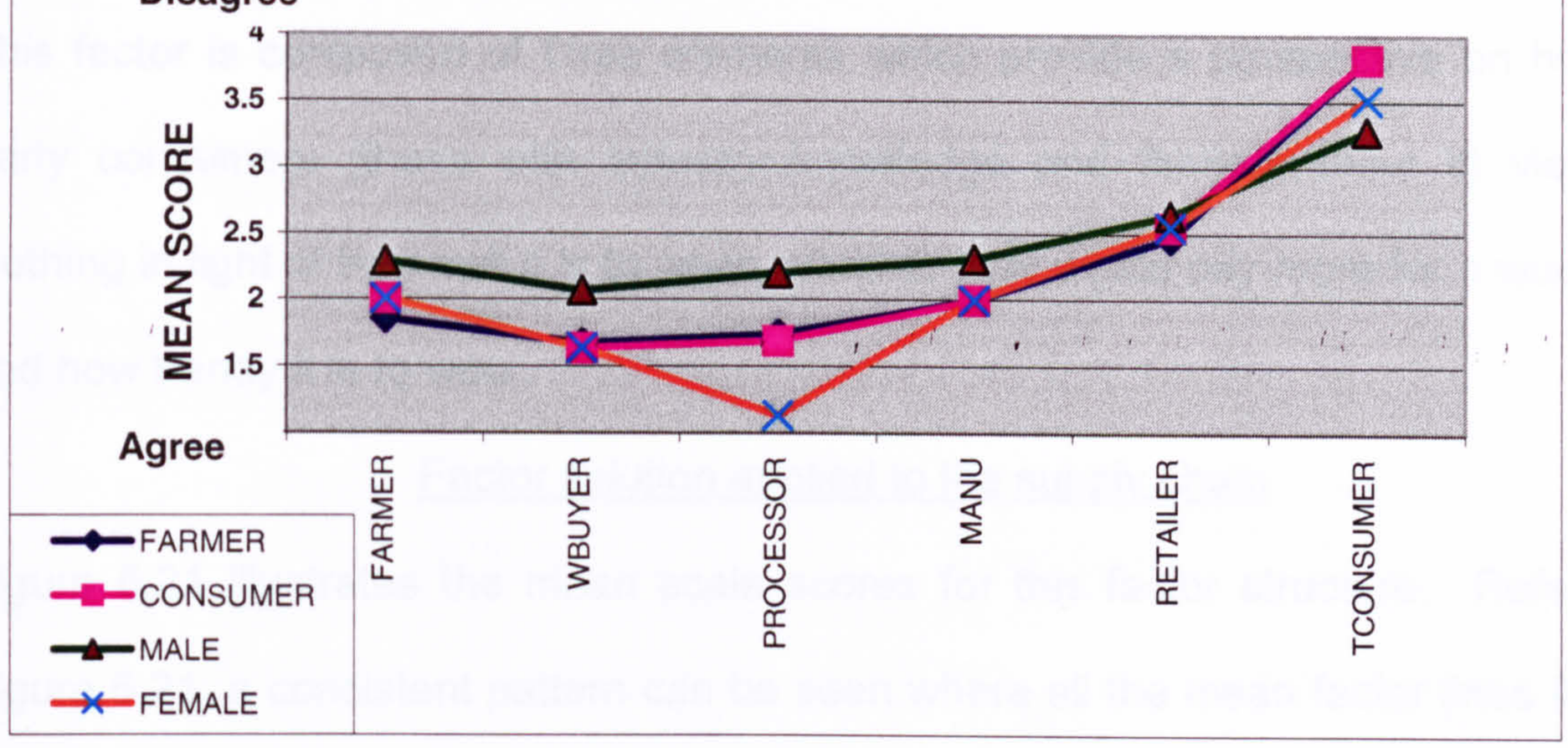
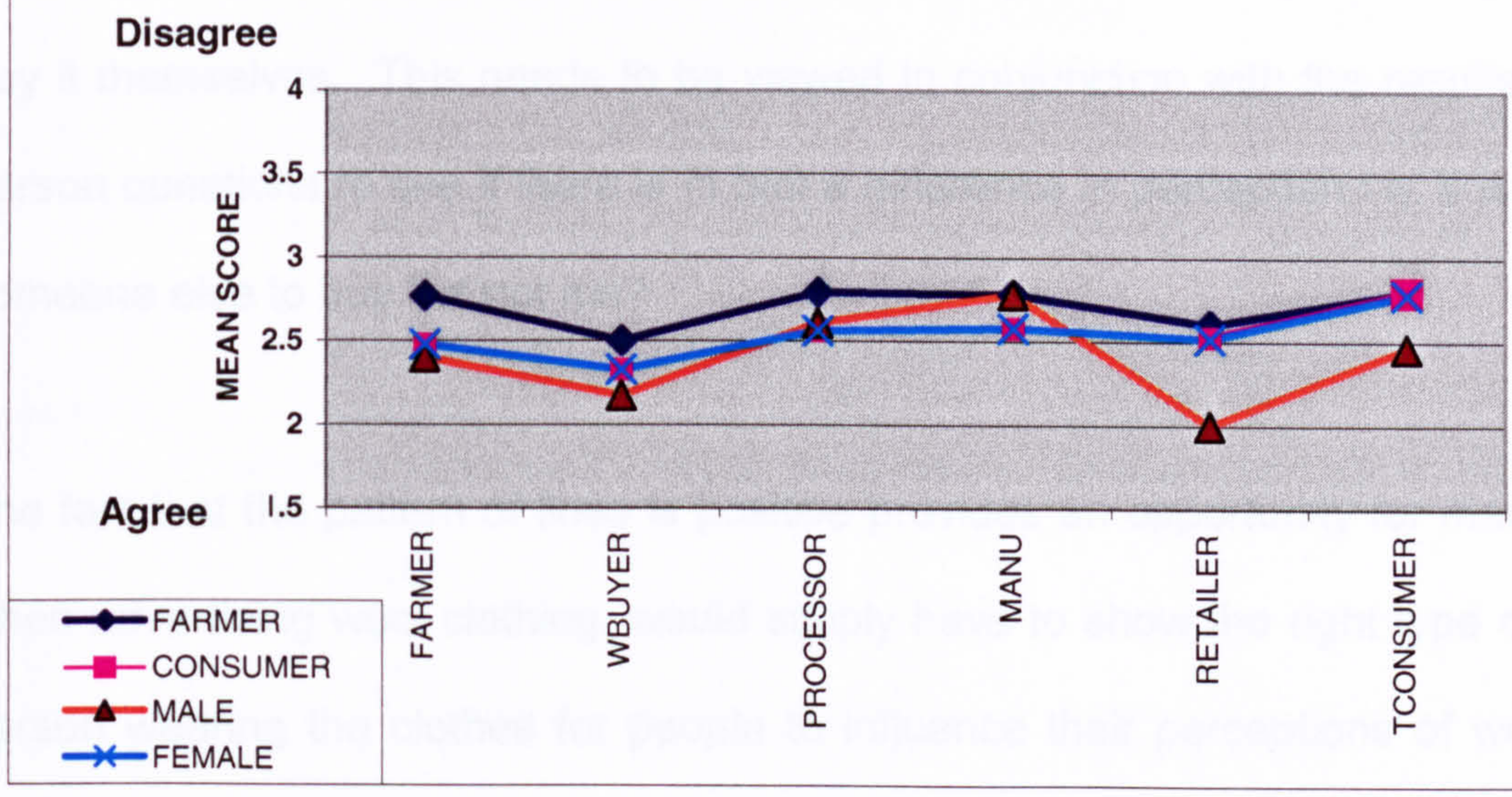


Figure 6.21:
Mean Scale Scores for Consumer Perspective Factore For Farmer/Total Consumer, Male, Female



- **AUGMENTED PRODUCT FACTOR STRUCTURES - CONSUMER PERSPECTIVE**

Discussion of the Factor Solution

This factor is composed of three elements which provide a perspective on how third party consumers (those with industry knowledge and those without it) view wool clothing in light of how soft it is to wear, whether they would pay more for a wool brand and how trendy it is to wear.

Factor solution applied to the supply chain

Figure 6.21 illustrates the mean scale scores for this factor structure. Referring to Figure 6.21, a consistent pattern can be seen where all the mean factor lines illustrate a positive perspective, with male respondents showing the most positive perception of all. The main issue from this finding is that if everyone in the supply chain does have such a positive perspective for a third person to buy wool clothing then why do they not buy it themselves. This needs to be viewed in conjunction with the results of the first person questions to see if there is in fact a difference in perception i.e. it is all right for someone else to buy but not me?

The fact that the pattern of lines is positive provides an opportunity for marketers who when advertising wool clothing, would simply have to show the right type of individual person wearing the clothes for people to influence their perceptions of wool clothing and perhaps even their purchasing decisions.

- **SUPPLY CHAIN FACTOR STRUCTURE**

The following summary statistics illustrates the factor structure for supply chain aspects.

FIGURE 6.22 SUMMARY STATISTICS FOR SUPPLY CHAIN ASPECTS

	Farmer	Total Consumer	Female Consumers	Male Consumers
Kaiser-Meyer-Olkin measure	.663	.557	.600	.507

FIGURE 6.23 PERCENTAGE OF VARIANCE EXPLAINED

	Farmer Data set		Total Consumer Data Set	
FACTOR	Percent of Variance	Cumulative Percentage	Percent of Variance	Cumulative Percentage
1	34.759	34.759	27.091	27.091
2	18.937	53.696	20.310	47.402

	Female Data set		Male Data Set	
FACTOR	Percent of Variance	Cumulative Percentage	Percent of Variance	Cumulative Percentage
1	30.381	30.381	22.992	22.992
2	19.76	50.141	21.687	44.679

FIGURE 6.24 FACTOR SCORES FOR THE FINAL SOLUTION

	Farmer	Total Consumer	Female	Male
Factor 1	Industry Attractiveness .781 .705 .554 .521	Industry Attractiveness .734 .697	Industry Attractiveness .712 .708 .549 .534	Industry Attractiveness .740 .686 .554
Factor 2	Supply Chain Dynamics .791 .746	Supply Chain Dynamics -.676 .667 .515	Supply Chain Dynamics -.848 .656	Supply Chain Dynamics .774 .697

- **SUPPLY CHAIN FACTOR STRUCTURES - SUPPLY CHAIN DYNAMICS**

Discussion of the Factor Solution

The first factor placed all the relationship statements together. This is important since by the analysis combing these elements there is proof in the belief that these relationships do exist. Current marketing thought has suggested that there are large opportunistic gains for organisations who grasp this concept (Gummesson, 1999).

Figure 6.25 illustrates the mean score patterns across the supply chain. It can be seen that there is a strong positive relationship between those in the supply chain. This view, however, is definitely not supported by consumers' views of retailers (see section 6.1). This is an important finding it tentatively supports the view that when considering a third person's view, there is a 'relationship' between parties thus supporting relationship marketing. However, the important issue is that if the respondents believe there is a strong positive relationship then why do they not feel this relationship themselves? Further research is required in this area to fully understand the strength and extent of relationship marketing in this sector.

Figure 6.25:
Mean Scale Scores for Supplychain Dynamics for Farmer/Total Consumer, Male & Female

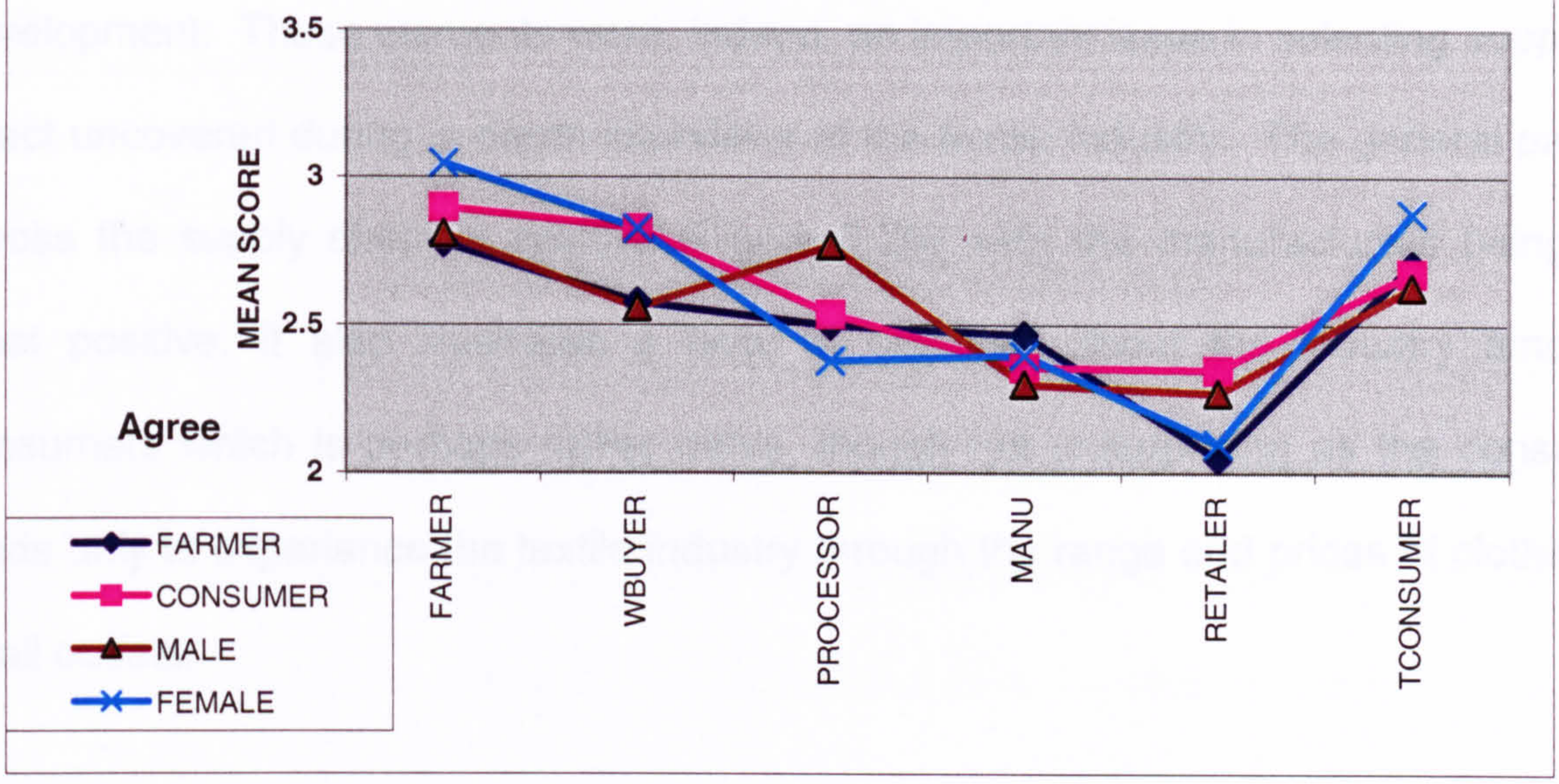
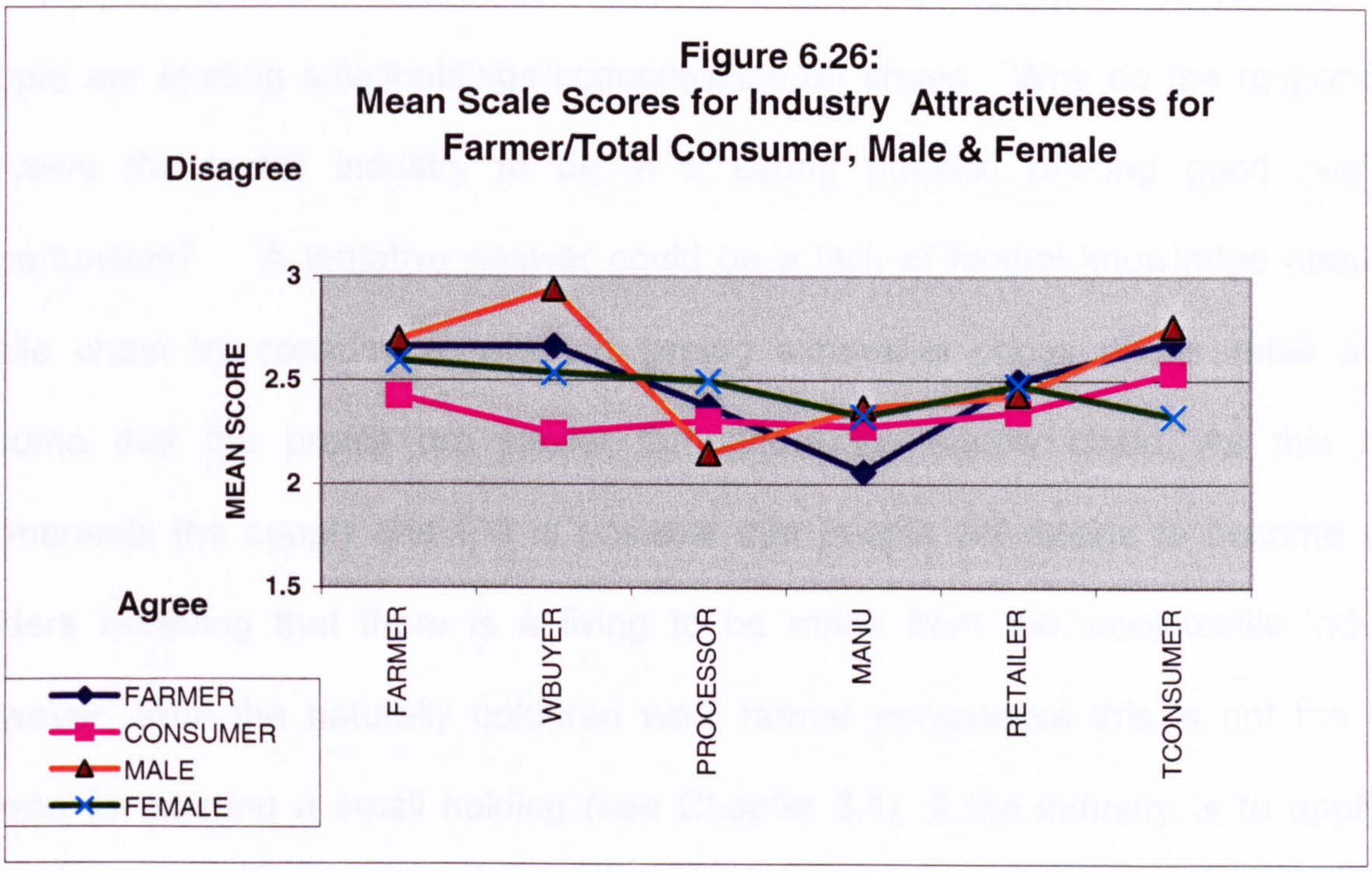


Figure 6.26:
Mean Scale Scores for Industry Attractiveness for Farmer/Total Consumer, Male & Female



- **SUPPLY CHAIN FACTOR STRUCTURES - INDUSTRY ATTRACTIVENESS**

Discussion of the Factor Solution

This second factor identified elements relating to growth and technological development. These elements were, indeed, an important issue in selecting suppliers, a fact uncovered during in-depth interviews of the textile industry. The general pattern across the supply chain is positive (Figure 6.26), with the manufacturers being the most positive. It also illustrates a level of optimism about the industry amongst consumers which is perhaps rather naïve, though not unsurprising as the consumer tends only to experience the textile industry through the range and prices of clothing in retail outlets.

This positive attitude to the textile market may in some way explain why, even today people are starting smallholdings concentrating on sheep. Why do the respondents perceive the textile industry to be in a strong position offering good business opportunities? A tentative answer could be a lack of factual knowledge about the textile chain by consumers, who on seeing expensive prices in the retail outlets assume that the profits are similar throughout the supply chain. As this belief permanents the supply chain, it is possible that people will decide to become small holders believing that there is a living to be made from the wool textile industry. However, from the naturally coloured wool farmer perspective this is not the main reason for starting a small holding (see Chapter 6.1). If the industry is to apply the

findings of this question then education is required to both ends of the supply chain. In the case of the consumers it could possibly be used to sell British wool clothing to keep the industry going, which if this worked would in fact assist the industry to grow. Conversely it may also stop potential small holders from undertaking a business where possible success is limited.

Factor solution applied to the supply chain

Figure 6.26 illustrates the mean scale scores for this factor structure. A remarkably similar pattern can be seen across the supply chain except for male respondents being consistently extreme throughout. Within the research a similar disparity has not been identified, therefore, it is necessary to undertake further research to identify if the male responses to this question are valid.

If we accept the findings at face value it does suggest that male consumers have very little understanding of the textile supply chain. This is perhaps not surprising if their purchase behaviour is also taken into consideration.

- **MEASURING INSTRUMENT 3 - SUPPLY CHAIN FACTOR DISCUSSION**

Factor analysis was performed on the supply chain questions concerning the importance of selection of suppliers. As previously discussed in Chapter 5 the items included within this question were specifically selected to explore the marketing relationships between those across the supply chain. Furthermore, it should be noted that due to the response size the mean scale score was for the other parties, based on the factor solution to this question. To ensure a similar structure occurred across the supply chain, a separate factor analysis was run on the other parties. Although statistically invalid due to the sample size (40) the result did show a similar factor solution to the farmer data set.

The original factor solution contained three factors. Two items 'proven supply' and 'relationships with suppliers', however, loaded across all factors and were deleted. The three supply chain factors were 'consumer', 'supplier' and 'transit' as the items within each factor were concerned with each of these areas. This solution provided an explanation for 69% of the extracted loadings. Figure 6.27 to 6.29 provides the summary statistics for this factor solution.

FIGURE 6.27 SUMMARY STATISTICS FOR SUPPLY CHAIN RELATIONSHIPS

	Farmer
Kaiser-Meyer-Olkin measure	**.795**

FIGURE 6.28 PERCENTAGE OF VARIANCE EXPLAINED

	Farmer Data set	
FACTOR	**Percent of Variance**	**Cumulative Percentage**
1	**39.123**	**39.123**
2	**14.920**	**54.043**
3	**9.822**	**63.864**

FIGURE 6.29 FACTOR SCORES FOR THE FINAL SOLUTION

	Farmer
Factor 1	**Transit** **.904** **904** **674**
Factor 2	**Customer** **.816** **.759** **.571** **.565**
Factor 2	**Supplier** **.792** **.678** **.628** **.523**

Factor solution applied to the supply chain

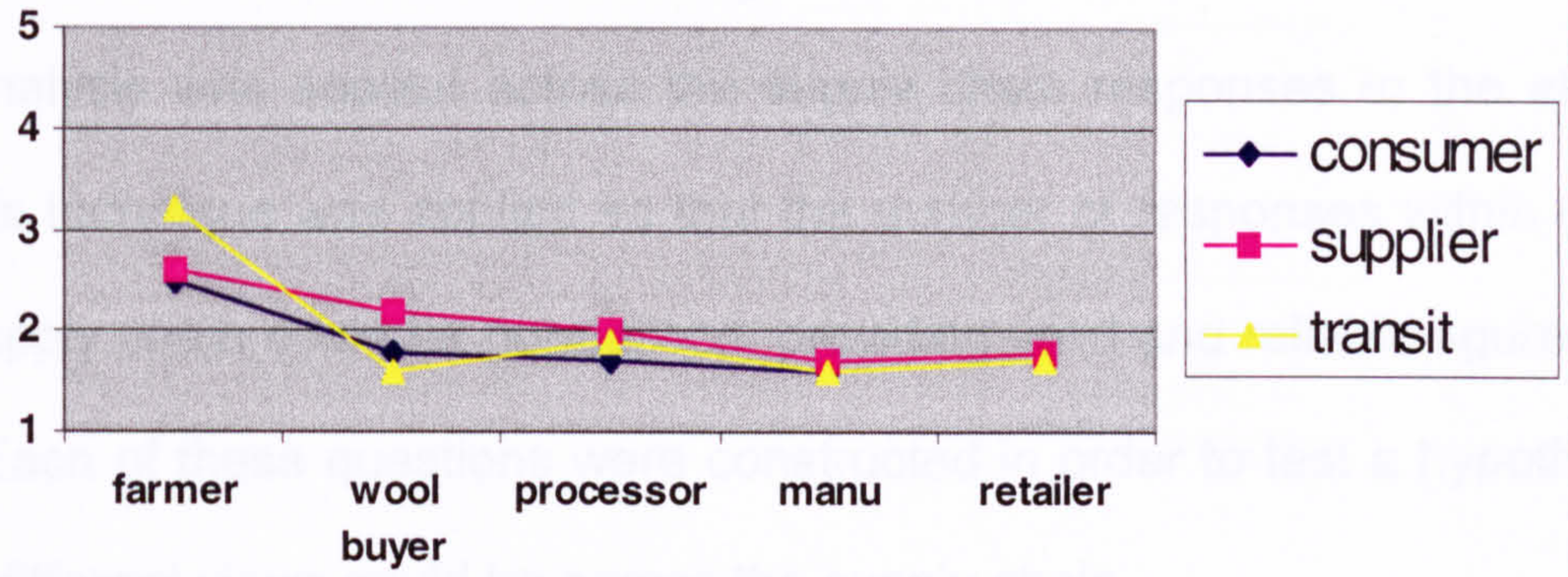
Figure 6.30 provides a separate graphical illustration of all of the three factor solutions. From the consumer line on the graph, it can be that the entire supply chain are concerned by consumer related issues. The factor solution research has identified areas such as relationships with customers, customer complaints, customer demand and mark up, as a composite grouping. It can be seen from the graph that as the product comes closer to the consumer end the buyer/supplier relationship becomes more important.

The supplier line displays a similar trend for the supplier-related issues of 'availability', 'knowledge' and 'paperwork errors'. It could be suggested that this provides evidence that some form of relationship marketing does occur through this supply chain. Since these issues are important to buyers in the supply chain it is postulated that there would be an appreciation for the need to develop a co-branded product to assist them with their work.

The transit line displays the final set of mean score scales across the supply chain for issues of shipment, transit delays, refilling of orders and relationships with the supplier. Apart for the manufacturer/retailer end of the supply chain, the results illustrate a divergence of the importance of delays, refilling of orders etc. This could be due partly with the lead times for the farmer in breeding the livestock and the changes within a

manufacturing supply chain where just in time stock control and delivery is of extreme importance. This is especially noted in the manufacturer/retailer section.

Figure 6.30:
Mean Scale Scores for Supply Chain Factors

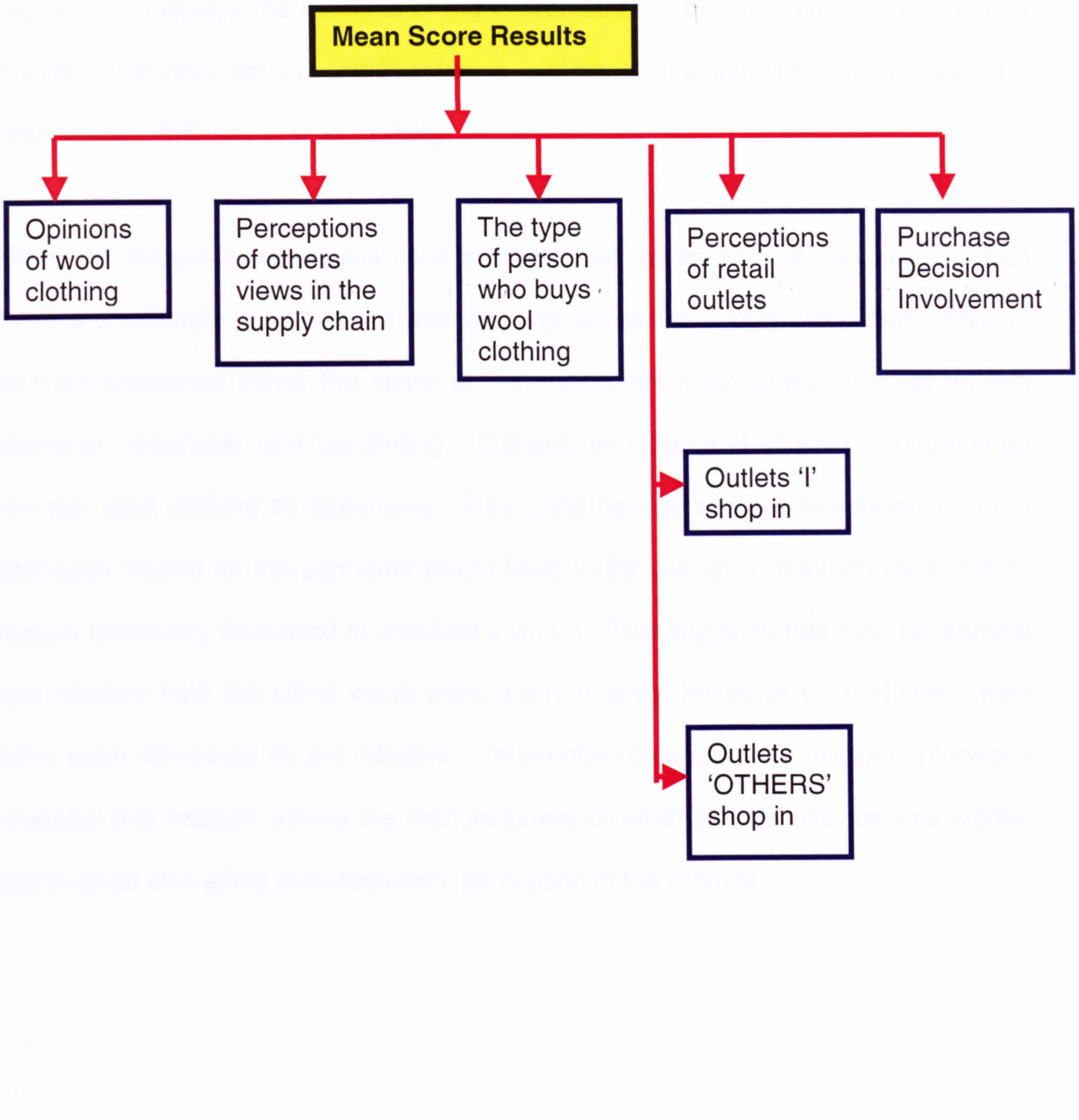


6.3 MEAN SCORE RESULTS

This section explores issues critical to the development of a brand strategy for naturally coloured wool. The findings from this section also play an instrumental part in the analysis of the conceptual model, which can be seen in section 4. This section has been broken into the areas shown in Figure 6.31.

Mean score analysis was applied across the supply chain responses to the above questions. This technique was applied so that the number of responses within each stage of the supply chain could be normalised, providing valid and reliable figures for comparison. Each of these questions were constructed in order to test a hypothesis of how similar/different views could be across the supply chain.

FIGURE 6.31 SECTION 3 OUTLINE

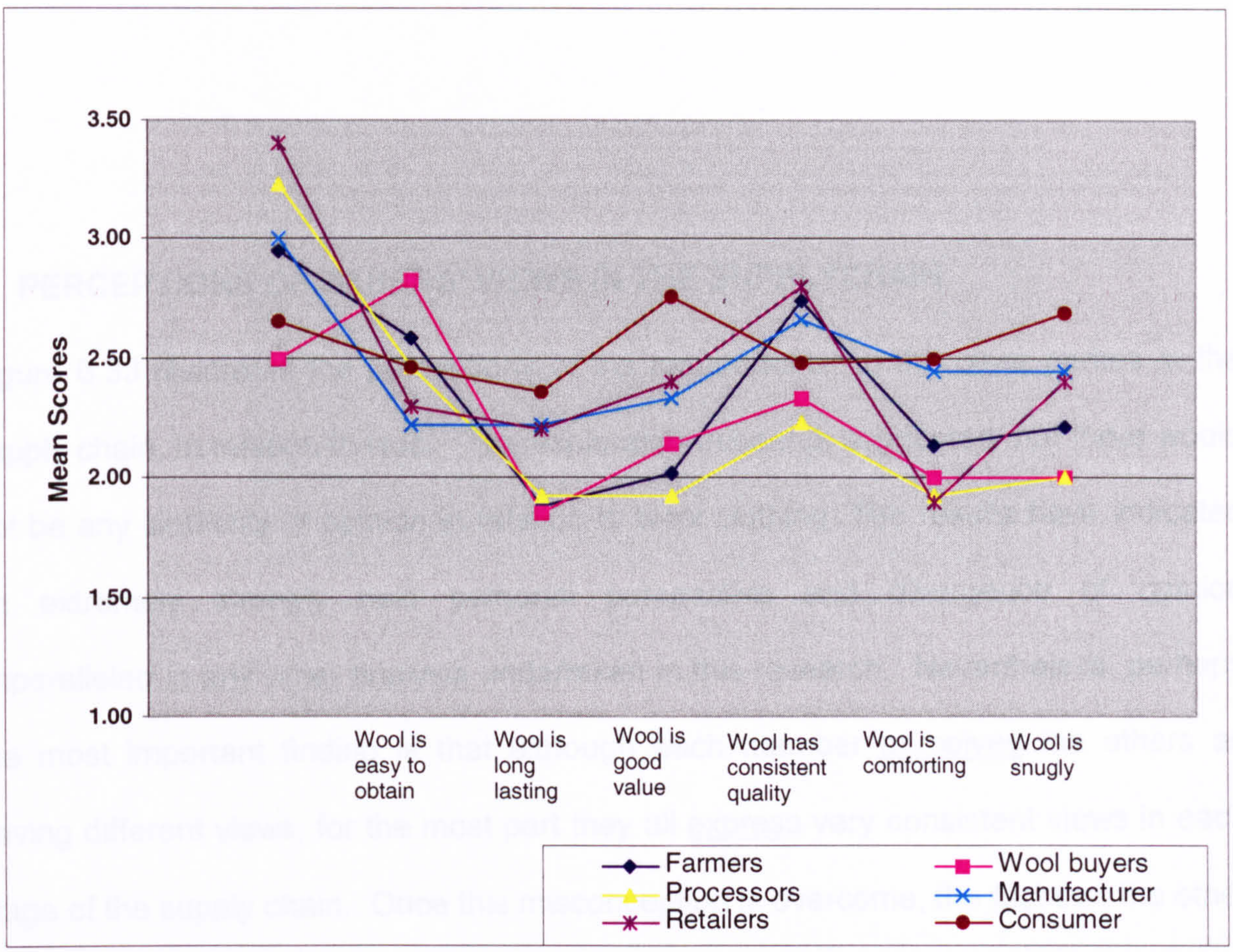


- **OPINIONS OF WOOL CLOTHING**

Figure 6.32 displays the opinions of the respondents to the 1) intrinsic (consistent in quality, comforting, snugly) and 2) extrinsic – (expensive, easy to obtain, long lasting & good value) attributes of wool clothing.

Using the consumer responses as a starting point for analysis, it can be seen that there is a similarity in opinions of wool clothing across the supply chain. Both retailers and manufacturers mirror the views of the consumers most closely, except for two elements 'expensive' and 'comforting'. It should be noted that all the respondents do not see wool clothing as expensive. This could have a serious consequence in the proposed market as the garments would have to be sold at a premium price due to factors previously discussed in chapters 2 and 3. This suggests that both consumers and retailers hold the same views without any external influence or, that consumers have been influenced by the retailers. Information obtained from in-depth interviews revealed that retailers advise the manufacturers on what they require for their stores, which could also affect manufacturer's perception of the product.

FIGURE 6.32: MEAN SCALES SCORES OF OPINIONS OF WOOL



The others in the chain – farmers, wool buyers and processors although mirroring the consumer line do so consistently together showing a more extreme view to each of the attributes stated.

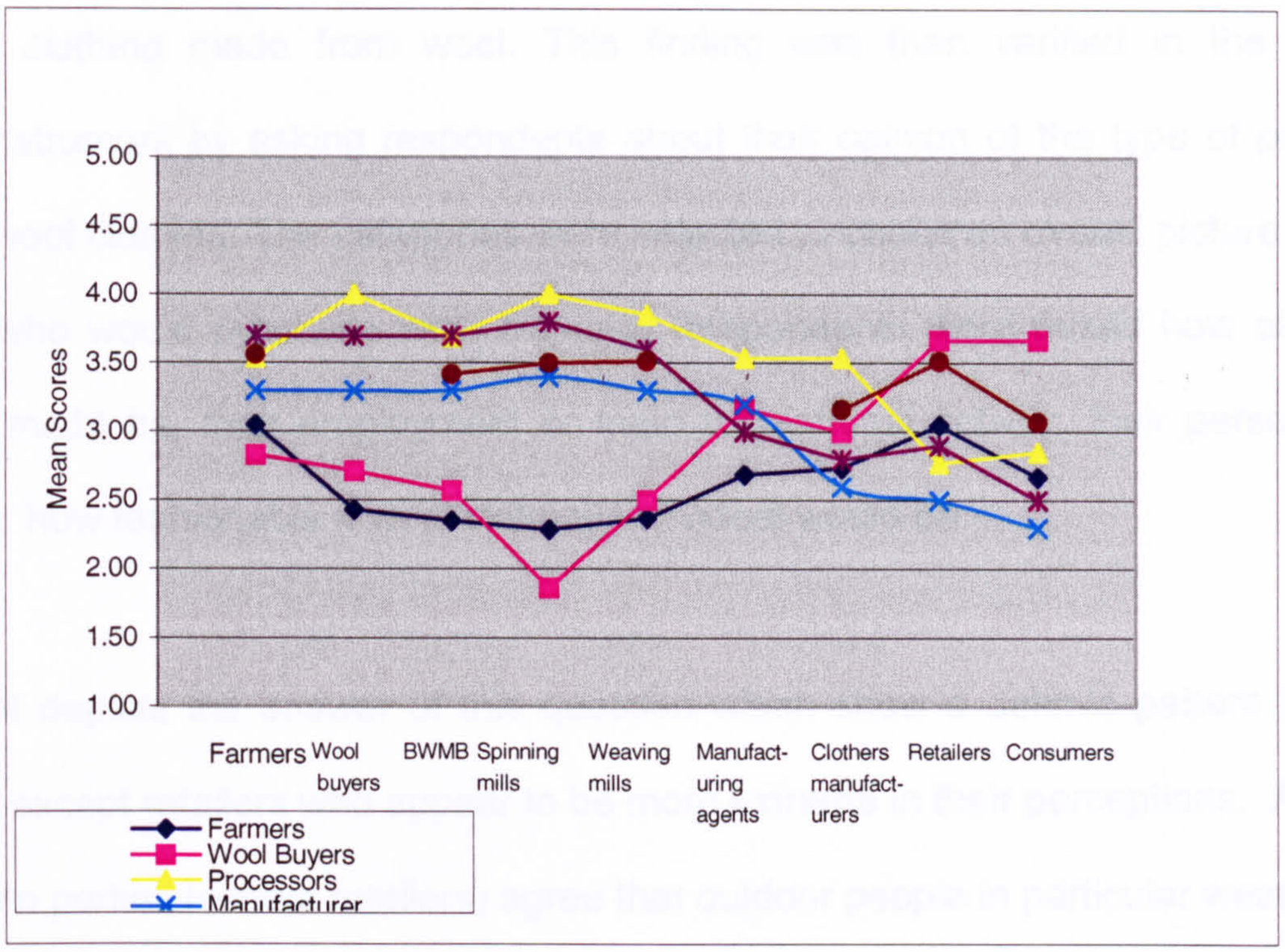
It could, therefore, be concluded that the supply chain could be divided into two with the early stages of the chain being more positive to the product. This difference in perception could cause many difficulties, as neither of the two groups understands this

difference in perception. Further research is necessary to identify how this difference in perceptions affects wool clothing purchase.

- **PERCEPTIONS OF OTHERS' VIEWS IN THE SUPPLYCHAIN**

Figure 6.33 illustrates the perceptions of the respondents, to the other parties in the supply chain, in relation to wool. The exploratory research suggested that there would not be any similarity of opinion in relation to wool clothing. The results have indicated an extremely strongly held personal perspective and divergence of opinion unparalleled in any other analysis undertaken in this research. Nevertheless, perhaps the most important finding is that although each member perceives the others as having different views, for the most part they all express very consistent views in each stage of the supply chain. Once this misconception is overcome, the fact that the other views are relatively similar could mean that co-operation could take place between the supply chain parties.

FIGURE 6.33: MEAN SCALES SCORES OF PERCEPTIONS OF OTHERS ACROSS THE SUPPLY CHAIN



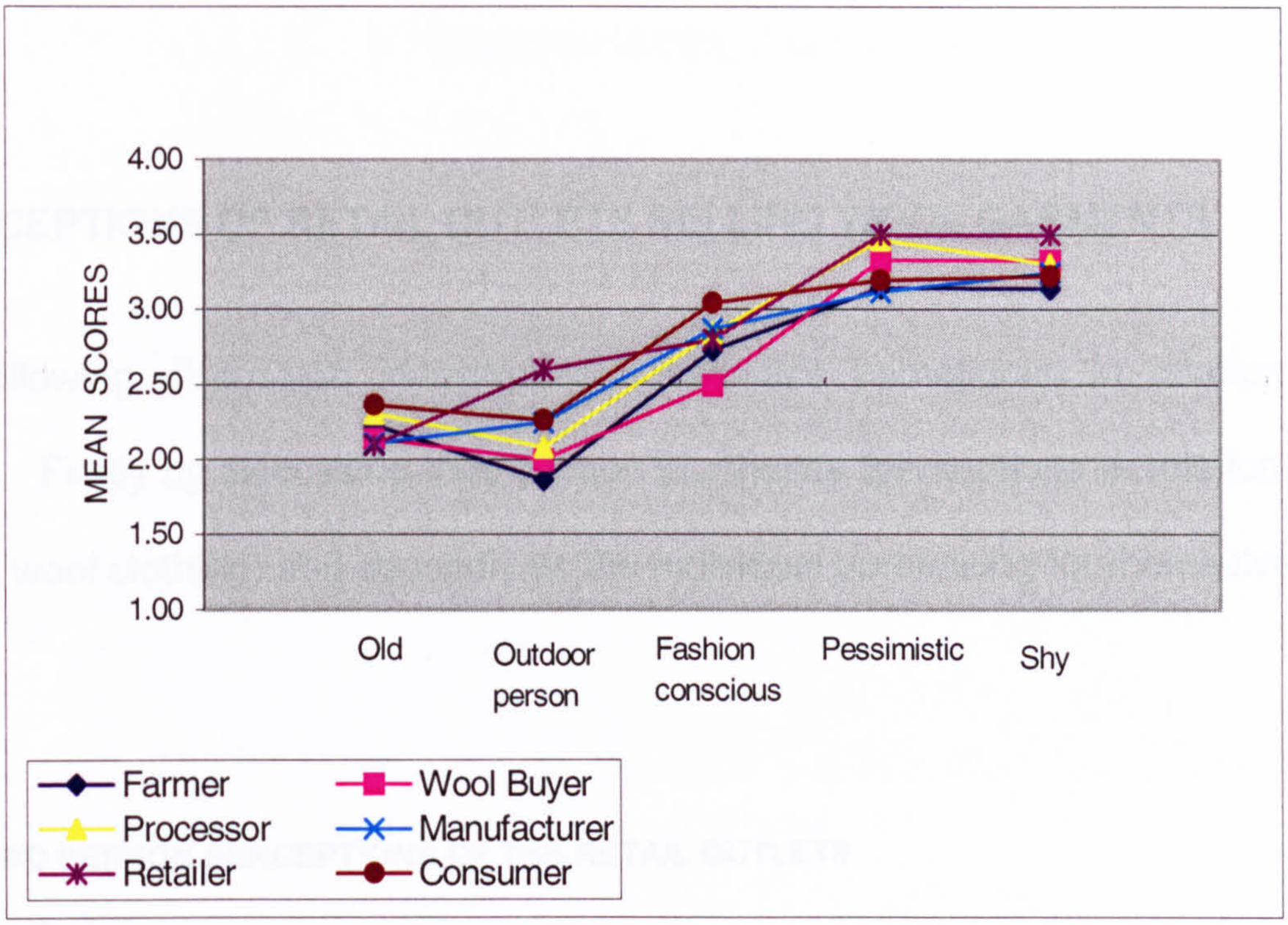
Again the findings divide the supply chain into two distinct groupings, with a convergence of opinions from the point of manufacturing agents to consumers. Farmers and wool buyers hold similar views being more positive in their perceptions of how the others view wool in the supply chain. From the manufacturing agents perspective there is no definite trend with everyone appearing to be confused. The second split includes all the other parties in the supply chain disagreeing that the others in the chain have similar views until clothes manufacturers to consumers are reached.

- **THE TYPE OF PERSON WHO BUYS WOOL CLOTHING**

The exploratory research identified that there was a definite 'type' of person who purchased clothing made from wool. This finding was then verified in the main research instrument by asking respondents about their opinion of the type of person who buys wool clothing. The categories were selected to obtain an overall picture of an individual who would purchase wool clothing. Respondents were asked how old the purchaser might be, their employment or main recreational activity, their personality and, finally, how fashionable a wool clothing individual would be.

Figure 6.34 depicts the answer of this question which show a definite pattern for all categories except retailers who appear to be more extreme in their perceptions. All the supply chain parties (except retailers) agree that outdoor people in particular wear wool clothing. It could be said that the retailers understand their customers better and that like many types of clothing i.e. sports trainers, customers purchase these items for both their brand image and trend factor, not necessarily their core function. If you carried this analogy to wool clothing then consumers may wish to appear rugged and outdoor without leaving their armchairs.

FIGURE 6.34: MEAN SCALE SCORES OF THE TYPE OF PERSON WHO WEARS WOOL ACROSS THE SUPPLY CHAIN



Consumers throughout the categories appear to be more consistent with their views tending to hold the middle ground in their perceptions for all categories except that of fashion conscious. In this category they are more negative than all the others in the others in the supply chain. This is one of the disappointing findings in this question because as long as customers believe this product to be unfashionable they will not purchase wool clothing at a premium price. Combining the results from all the categories in this question the findings support the exploratory research that overall the supply chain parties hold a similar view that the type of person who buys wool clothing

is an older, outdoor type who would be optimistic and sociable. However this person may not be as fashionable as expected.

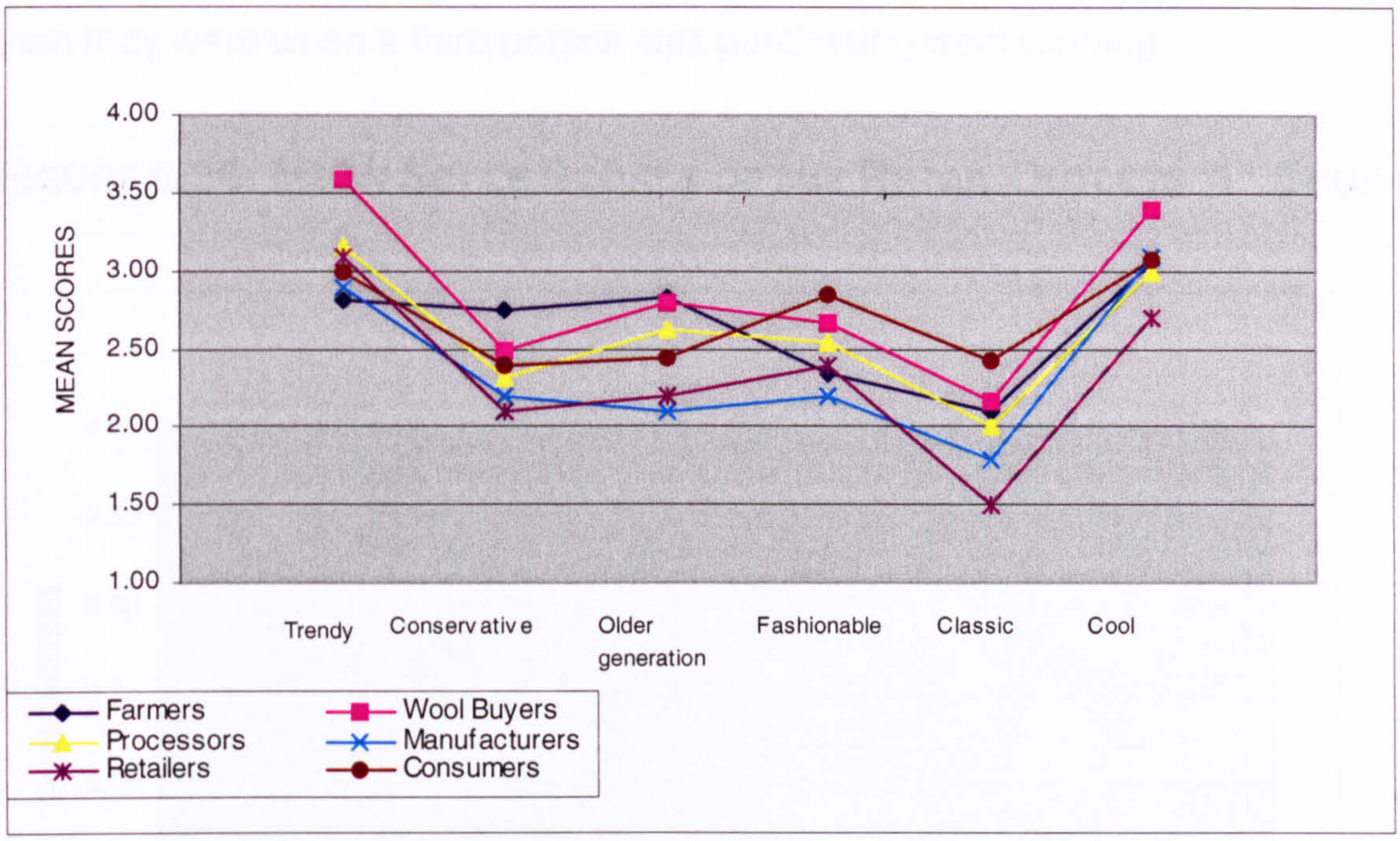
- **PECEPTIONS OF RETAIL OUTLETS SELLING WOOL GARMENTS**

The following discussion investigates consumer's perceptions in relation to retail outlets. Firstly by discussing third person purchases (perceptions in relation to others buying wool clothing) and secondly as the individual purchasing for themselves.

❖ **THIRD PERSON PERCEPTIONS OF THE RETAIL OUTLETS**

From Figure 6.35 it can be seen that consumers hold the middle ground amongst the responses. The most strongly held view by the supply chain is that retail outlets selling wool clothing are classic in style, stock and shop layout. As a result, this could also mean an expensive place to purchase clothing. It can also be noted that everyone in the supply chain apart from the consumers believe that the outlets selling these products are fashionable. Consumers (supported by the previous graph) do not believe that people wearing wool are fashionable it would, however, follow that shops selling wool clothing may not be deemed to be fashionable either.

FIGURE 6.35: MEAN SCALE SCORES OF THE PERCEPTIONS OF OUTLETS SELLING WOOL GARMENTS

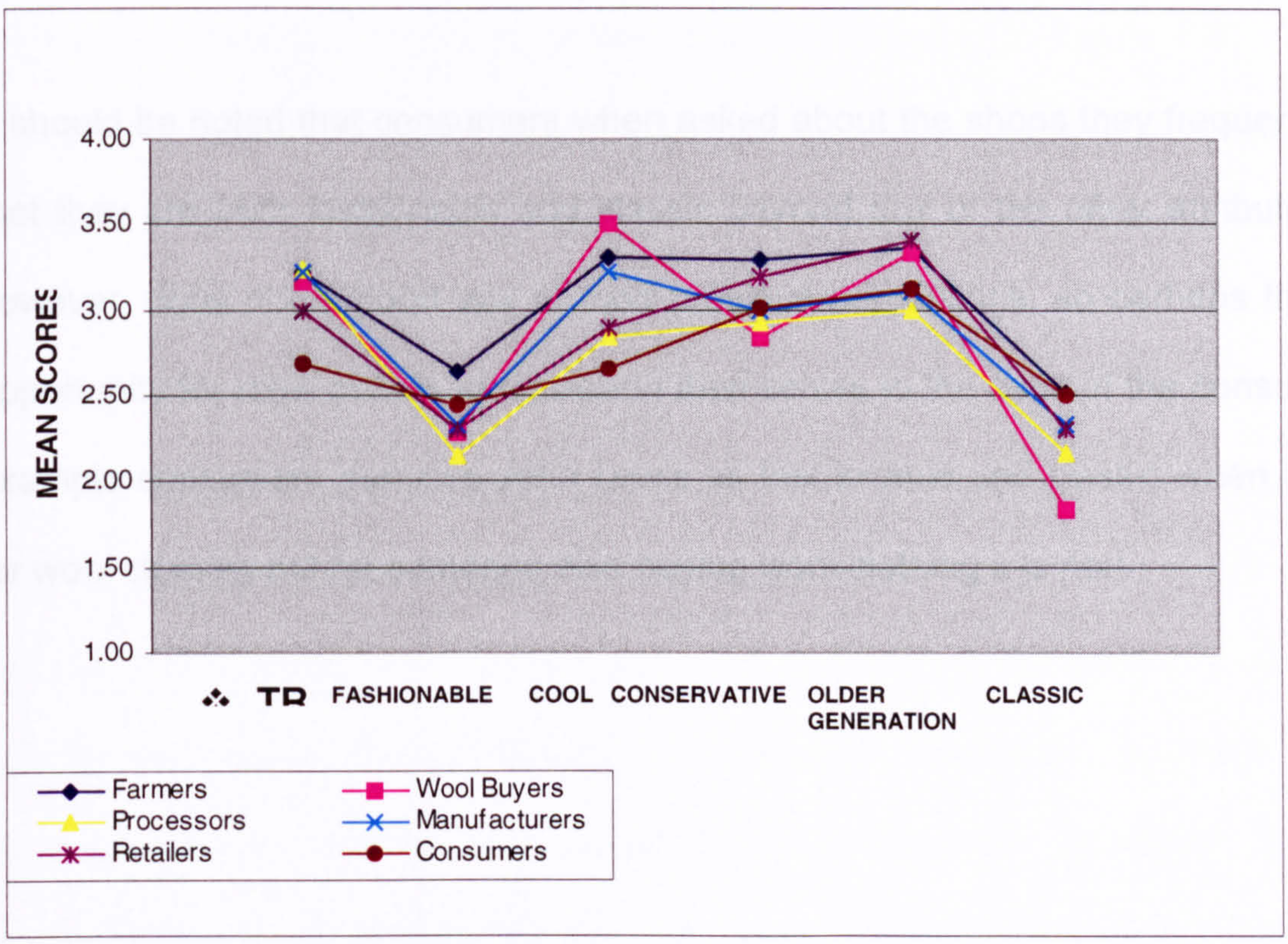


Consumers also hold a consistent and negative perception of retail outlets which sell wool clothing when another person is buying the clothing. Consumers believe that they are not fashionable/trendy and are mainly for older clients and have the classic and conservative style of outlet suitable for this type of consumer. This finding could have serious implications for naturally coloured wool. Too strong a connection to any specific retail chain could either improve or adversely affect the retail outlet perception – thus reducing the possibility of both the product being stocked by the retailer and the purchase of the product by the young, fashionable and trendy consumer.

❖ PERCEPTIONS OF THE RETAIL OUTLETS 'I' SHOP IN

Figure 6.36 displays the results of all respondents' perceptions of the retail outlets where, they personally purchase wool clothing. Again a strong pattern in consumer perceptions is evident. In fact the respondents are more positive to all the attributes than they were when a third person was purchasing wool clothing.

FIGURE 6.36: MEAN SCALE SCORES OF THE RETAIL OUTLETS "I" SHOP IN



The main consumer responses are mostly more positive to all the attributes especially classic. Figure 6.36 shows that all the respondents believe that the retail outlets which sell wool are 'classic'. However, the other supply chain members are more positive about this attribute than consumers. This belief could be due to the unique personal experience of wool clothing, supply chain members possess. This may affect their perceptions and use of the product at their stage in the supply chain. Further research is required to identify the extent of how these perceptions affect purchasing behaviour.

It should be noted that consumers when asked about the shops they frequent, believe that they are both fashionable and classic beyond any of the other attributes. This, however, does not support any of their previous perceptions, so perhaps there is an opportunity for retail outlets to reposition themselves in the eyes of the consumer. For example consumers perceive John Lewis as fashionable and classic when they shop for wool clothing but for someone else buying wool clothing it is not!

- **PURCHASE DECISION INVOLVEMENT**

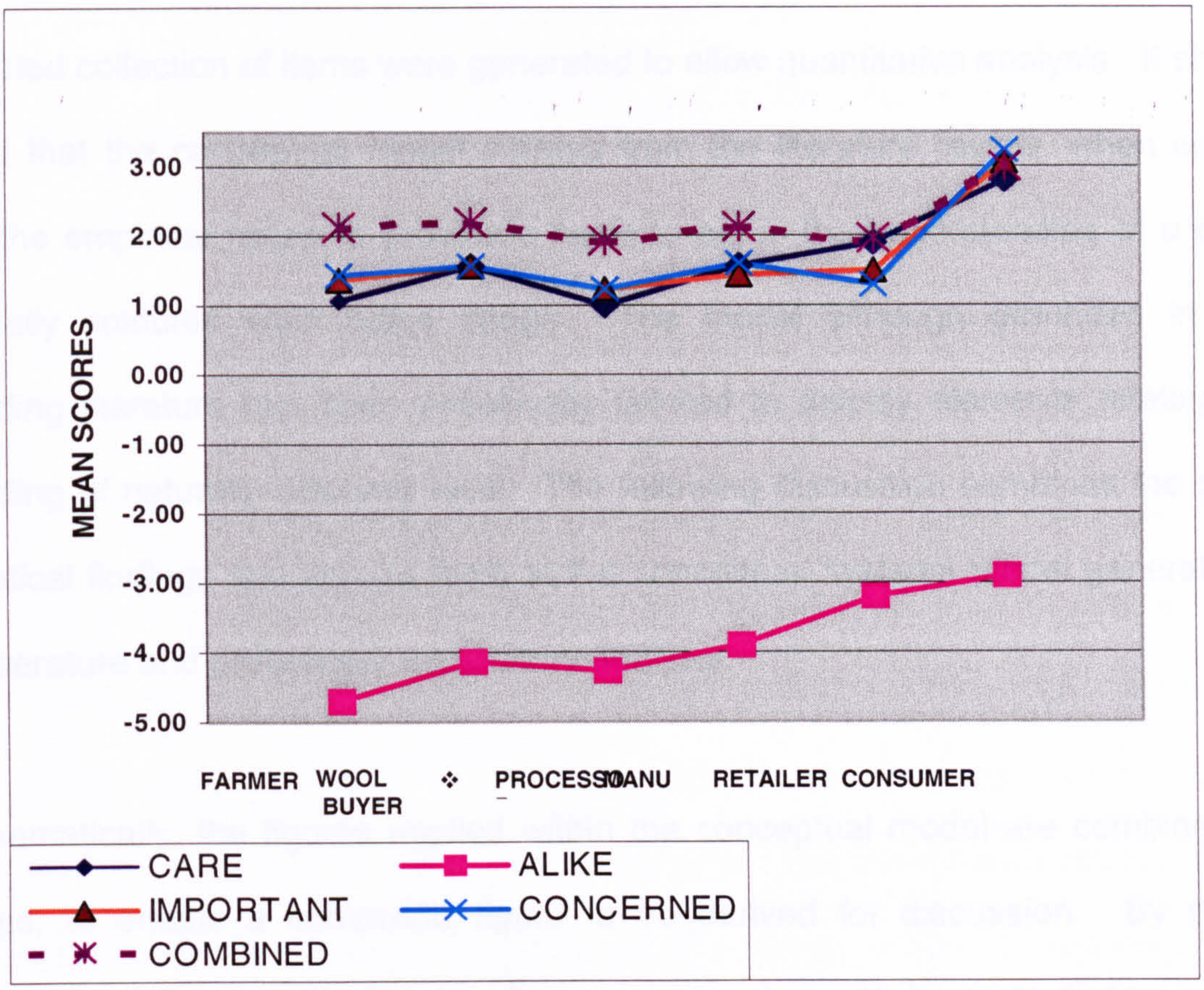
Figure 6.37 displays the combined results of Mittal's (1989) purchase decision involvement scales for purchases throughout the textile supply chain. The purpose of these scales is to identify the purchaser's level of involvement with the product. In this research the closer the data point is to zero, the higher the level of involvement.

Each of the individual elements of the scale are identified in Figure 6.37. From the individual scales an important finding is that consumers perceive wool clothing brands as the most similar across the supply chain. While, naturally coloured wool farmers perceive the wool brands (sheep identifiers) as very different.

The most important line in Figure 6.37 is the combined data line which illustrates the level of involvement each stage of the supply chain have when purchasing their product at their stage in the value chain. Not surprisingly, the level of involvement is high as the product passes through the stages of production, as there are many organisational constraints and expectations of buyers. However, it is very disappointing to see that consumers are not particularly involved with wool brands when they purchase wool clothing. This shows that not only would you have to communicate and educate the public for the introduction of any new brand but also that a higher level of involvement would have to be created in order for consumers to realise that a new brand exists. Further research needs to be undertaken to identify

how the consumer level of involvement could be improved and if this would have any significant impact on the purchase of wool clothing.

FIGURE 6.37: MEAN SCALE SCORES FOR PRODUCT DECISION INVOLVEMENT



6.4 MODEL DISCUSSION

The rationale for the creation of the conceptual model was discussed in chapter 4. The literature review identified several brand attribute concepts which could aid in the understanding and analysis of brand identity. As previously discussed in Chapter 5, a validated collection of items were generated to allow quantitative analysis. It should be noted that the conceptual model created from the literature review, when combined with the empirical research provide a basis to aid in the understanding of a potential naturally coloured wool brand image. The model although grounded in current branding literature has been specifically tailored to display elements relating to the branding of naturally coloured wool. The following discussion combines the previous statistical findings and applies them to the conceptual systems model generated from the literature and preliminary exploratory analysis.

Mathematically, the figures applied within the conceptual model are combined mean scores, to enable a composite figure to be derived for discussion. By pictorially displaying the general trends discussed in the previous sections a clearer understanding of the elements of the brand identity can be seen.

- **SUPPLY CHAIN MODEL**

To summarise, the conceptual systems model portrays three series of flow lines. The first being the 'product' as it moves through the value chain, (as the product passes through the supply chain, its form changes as denoted by the product box). The second flow is the direct and indirect, interrelationships between the parties within the supply chain. Finally the third flow denotes part of the brand identity hexagon (Figure 6.38).

For naturally coloured wool, brand identity is a complex measure of perceptions to stimuli concerning the processing element of the supply chain, the clothing manufacturer, retailer, consumer self and product image. There are many possible combinations of variables that could affect this identity held by each purchaser in the value chain, not with standing the fact that this view can continually change through both experiential and informed knowledge of the product. This research has allowed a base level of knowledge of current perceptions to allow the marketer to identify if any of these perceptions are inhibiting the current activities relating to naturally coloured wool. Once these perceptions are understood strategies can be developed to overcome any negative or neutral barriers identified and to exploit any positive perceptions.

The naturally coloured wool systems model illustrates the perceptions of each member of the supply chain, in relation to all other members. This is particularly important as relationship marketing is to play such an integral role in the marketing of this product.

The application of the perceptual mean scores of how others viewed wool in the supply chain can be seen in Figure 6.38. For the purposes of this research it was decided to divide possible responses into three:

- Positive view would be less than or equal to 2.9
- Neutral view 3.0 – 3.4
- Negative view would be equal to or greater than 3.5.

For ease of clarification Figure 6.38 displays the mathematical signs (+,-,=), the actual figures can be seen in Appendix C. The author is aware that these are subjective groupings and could be noted as a limitation of the study. Referring to Figure 6.38, there are two important features of this supply chain. Firstly (denoted by the horizontal lines), those involved in a direct relationship with each other for example retailer and consumer. The findings have highlighted that those involved in such relationships have similar perceptions of the other party within that transaction. It is particularly interesting to see that those involved in the production section of the supply chain (wool buyers to manufacturers) hold either a neutral or negative views of each other.

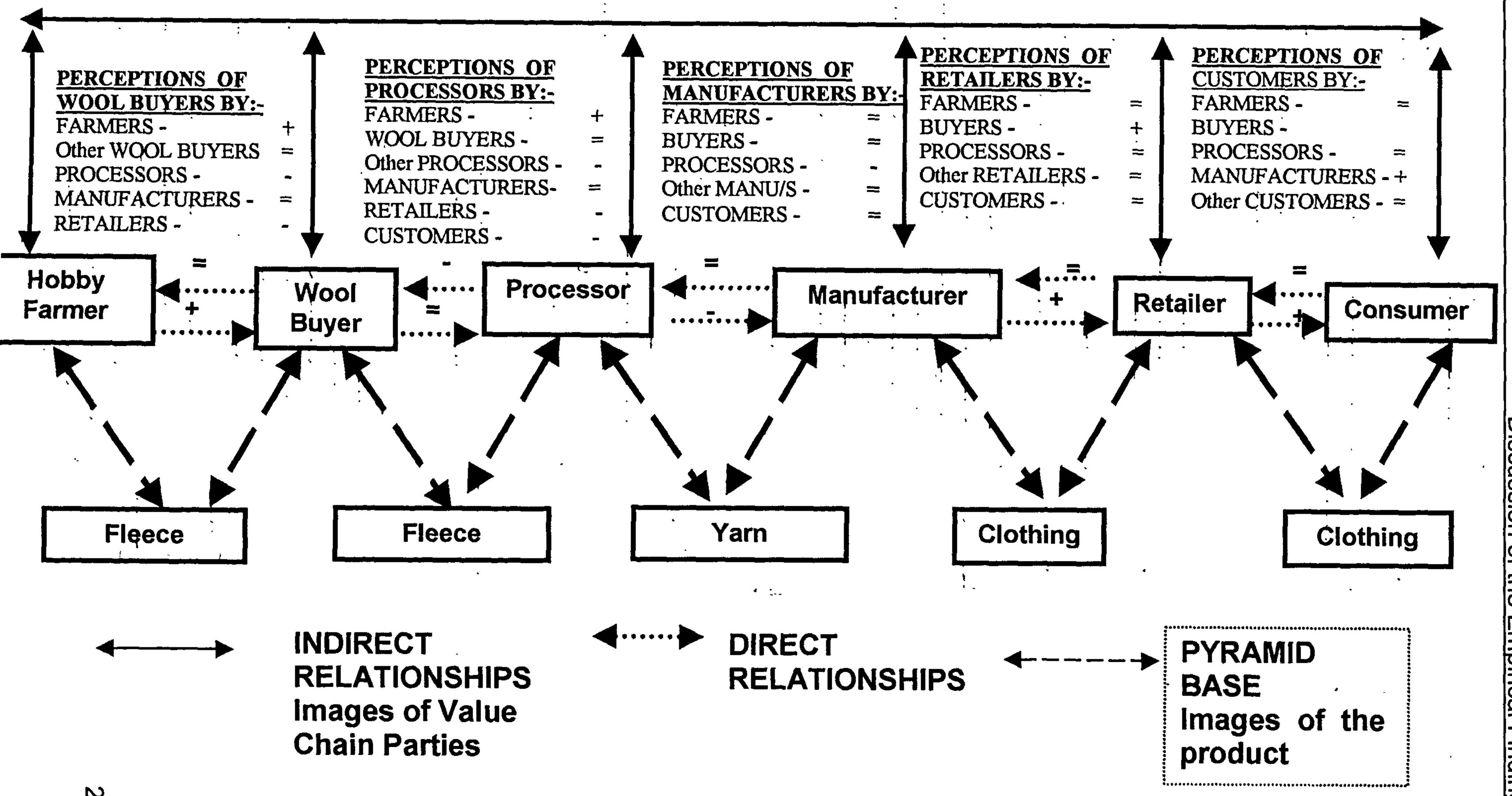
Processors in particular are markedly negative to both their suppliers and customers. This finding is not a surprise as in-depth interviews with processors identified that this group felt particularly pressured by their customers and had difficulties meeting quality levels etc., because of the raw materials provided by their suppliers. Conversely, the analysis also highlighted the fact that the views of others in the supply chain to whom each member is not in a direct working relationship is not positive (denoted by the

vertical lines). For example the supply chain members views of retailers (4 neutral and 1 positive image).

In-depth exploratory analysis with naturally coloured wool farmers suggested that they perceived retail outlets as the main reason for their dilemma i.e. not stocking or selling naturally coloured wool products. It is interesting to note that 4 out of 5 channel members have a neutral opinion of retailer's attitude to wool clothing. This finding is more positive than the exploratory research suggested. It should, therefore, be easier to alter this perception (as it is neutral not negative) to a more positive one. This would assist channel members to believe in a consistent view, which should help in the development of a co-operative marketing approach.

The implication of this finding is that there is another barrier to be overcome when attempting to promote co-operation across the supply chain. It would be necessary to undertake further research to investigate why these perceptions are so negative and if this negativity would have any real effect on a profit making scheme for the supply chain.

FIGURE 6.38 OVERALL SYSTEM MODEL OF SUPPLY CHAIN IMAGES



- **THE IDENTITY HEXAGON**

The hexagon model was devised to illustrate the strength of perception in the supply chain as a means for development of a brand identity. The shape is based on an area graph with 6 axis's, the stronger the strength of perception the smaller and more equal the sides of the hexagon. Figure 6.39 identifies the section of the empirical instrument where each variable is located, how it was measured and how it relates to the lines on the model

FIGURE 6.39 SUMMARY OF VARIABLES APPLIED IN THE CONCEPTUAL MODEL FOR NATURALLY COLOURED WOOL CLOTHING

State of Variable	Variables identified on the hexagon	Research Question	Identified by Preliminary Exploratory Research	Identified by Literature Review	Variable from questionnaire
Permanent	SUPPLY CHAIN IMAGE	The perceptions of the others in the supply chain	Yes		Mean scale score
Variable	PURCHASE DECISION INVOLVEMENT	Purchase decision involvement		Yes	Mittal's calculation
Permanent	PRODUCT IMAGE	Perceptions of wool clothing	Yes		Extrinsic and Intrinsic mean scale scores
Permanent for this product	PRODUCT ATTRIBUTE	Perceptions of naturally coloured wool	Yes		NCW factors mean scale scores

The generic hexagon (Figure 4.6 in Chapter 4) applied in this section is used as a vehicle to more closely understand some of the facets which compose this brand identity (Kaperfer,1997; Keller, 1993; Biel, 1992). These lines are the naturally coloured wool image (image of products made from naturally coloured wool), supply chain image (views of supplier/consumer) and product image (views of wool clothing in general). The last two lines however, purchase decision involvement have been included on the basis that the more involved a purchaser is with a particular brand the more likely they are to purchase it (Assael, 1998). If there is a strong positive image, there will be a small equal sided hexagon in the centre of the diagram. Negative or neutral signs will cause the shape of the hexagon to alter as the larger and more irregular the shape the more varied the image held. It is, therefore, possible to visually see the strength of the brand image for naturally coloured wool as the product passes through the supply chain.

Figures 6.41 to 6.45 illustrate the identity hexagon for each section of the supply chain. As appropriate the variables were combined to provide one mean score for each line of the hexagon.

- An assumption has been made (due to the extreme possibilities for inclusion in the purchase decision see chapter 4), that the purchase decision involvement of the buyer from any member in the supply chain is equivalent to the purchase decision involvement when selling the product.

The size of the lines on each of the hexagons illustrate the strength of attitude at each stage of the supply chain. The supposition is that if a strong positive attitude is held

between both parties because the mean scores have been used to draw the lines, then the hexagon will possess equal sides (see Appendix C for the actual numbers). An irregular shape shows that the attitudes are not consistent at that stage of the supply chain. Figure 6.40 summarises the findings from the supply chain hexagons

FIGURE 6.40 SUMMARY OF MODEL FINDINGS

HEXAGON	Consistent Variables	Irregular Variables
1	Supply chain image Naturally coloured wool Both PDI	Both Product Image
2	Supply chain image Naturally coloured wool	Both PDI Both Product image
3	Supply chain image Naturally coloured wool	Both PDI Both Product image
4	Supply chain image Naturally coloured wool Both Product image	Both PDI
5	Naturally coloured wool	Both PDI Both Product image Supply chain image

Referring to Figure 6.41, Hexagon 1, it can be seen that there are only slight variations in attitude and so it can be surmised that farmers and wool buyers hold similar positive attitudes to naturally coloured wool. The shape of Figure 6.42, Hexagon 2 is irregular. Closer inspection shows that the wool buyers are more involved with purchasing wool than the processors. Importantly there is a negative attitude between the wool buyer and processor. Figure 6.43, Hexagon 3 is a very similar shape to number 2. The size of the hexagon is due to the wool processor involvement which is much higher than the manufacturer and a negative attitude between wool processors and manufacturers. In Figure 6.44, Hexagon 4 there is a change in the elements that are not consistent.

Here, for the first time the perception of naturally coloured wool moves from being positive to neutral. The retailer is also more involved with the purchasing of clothes than the manufacturer is with cloth etc. The last Figure 6.45, Hexagon 5, shows the most inconsistent attitudes across the supply chain with retailers being highly involved and consumers neutral at best in purchasing of clothes. While, the image of naturally coloured wool is also neutral.

By using the pictorial representation of a hexagon it is very easy to see the disparity of attitudes across the supply chain. Although involvement levels for four out of the five are positive, for the consumer this is not the case. If this product is to succeed in the market place then it most rate higher in involvement with consumers. The other significant point highlighted by the hexagons is that naturally coloured wool is considered as being positive through the supply chain until the retailers/consumer stage. This shows that the last two stages of the supply chain, need to change their perceptions in order to ensure success. Therefore, any strategies developed for naturally coloured wool must commence with improving this attitude to ensure stocking within the retail outlets and purchase by consumers.

This approach has proved fruitful revealing findings that could not be so easily detected via general statistical analysis, when one facet of the data was analysed at a time. Nevertheless, as for the future of naturally coloured wool the findings of this holistic approach do suggest that it would be very difficult to change so many non-

positive views to enable the supply chain to co-operate in solving this marketing dilemma, without outside intervention.

FIGURE 6.41 IDENTITY HEXAGON FOR SECTION 1 OF THE MODEL

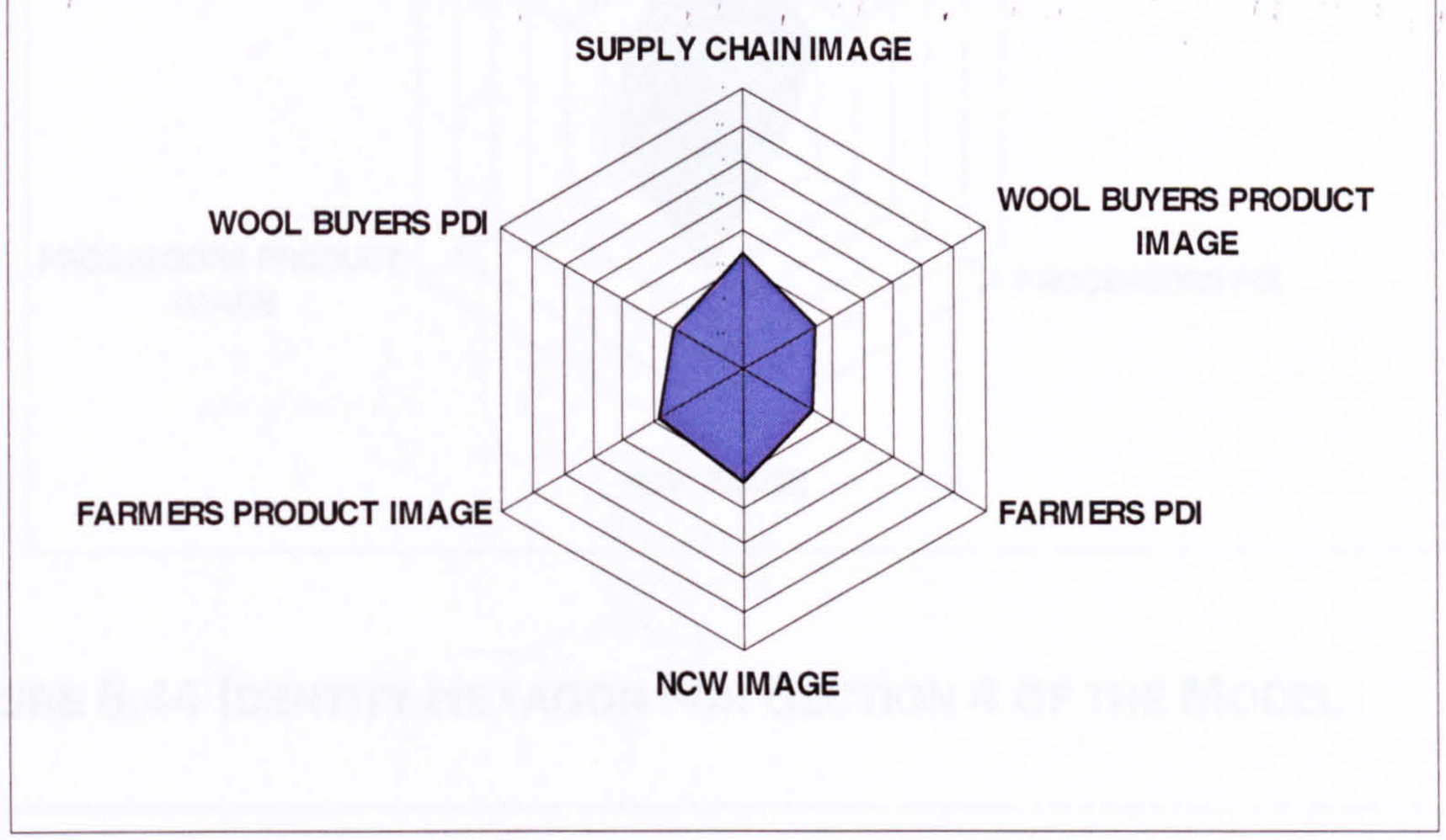


FIGURE 6.42 IDENTITY HEXAGON FOR SECTION 2 OF THE MODEL

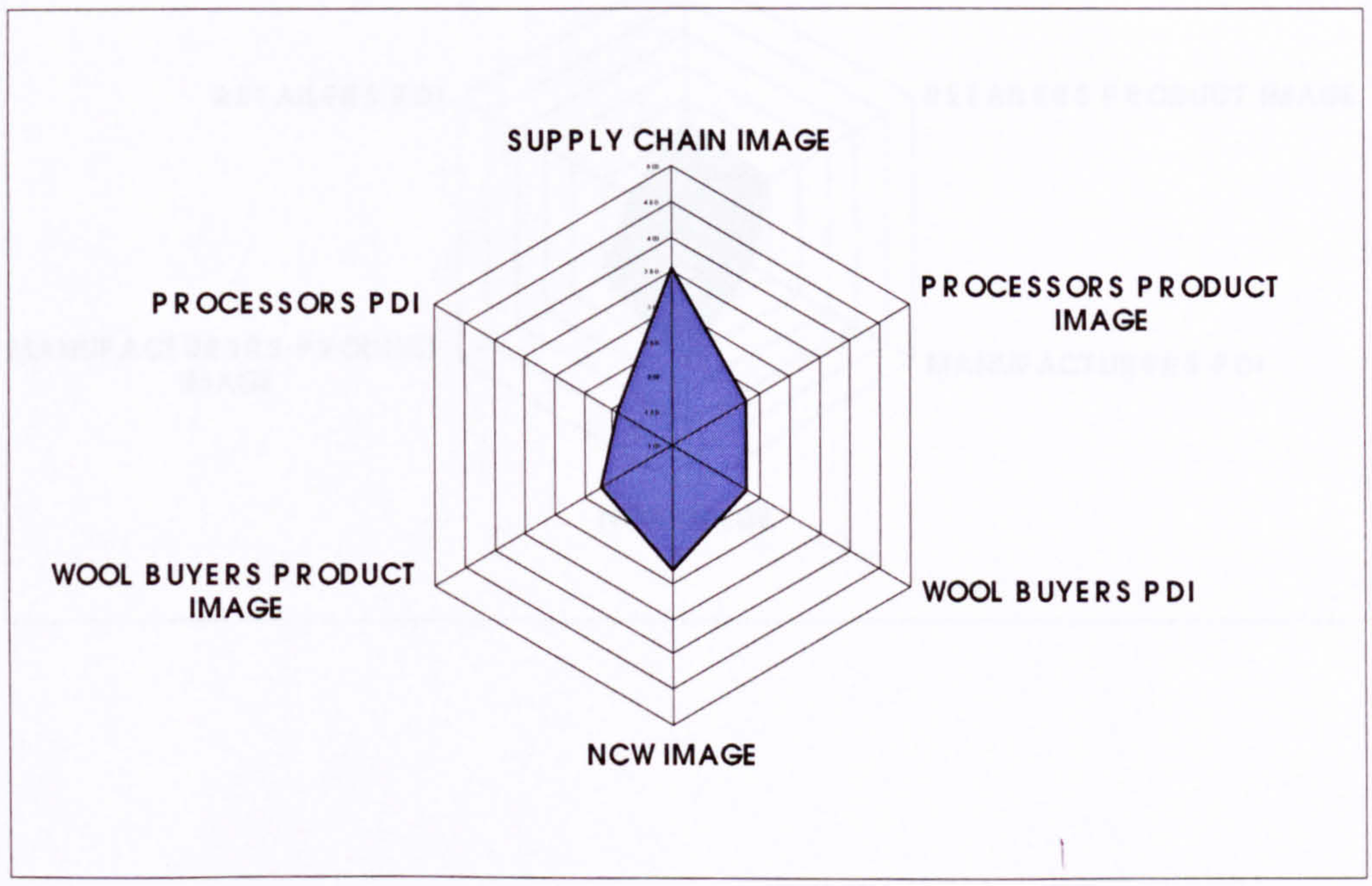


FIGURE 6.43 IDENTITY HEXAGON FOR SECTION 3 OF THE MODEL

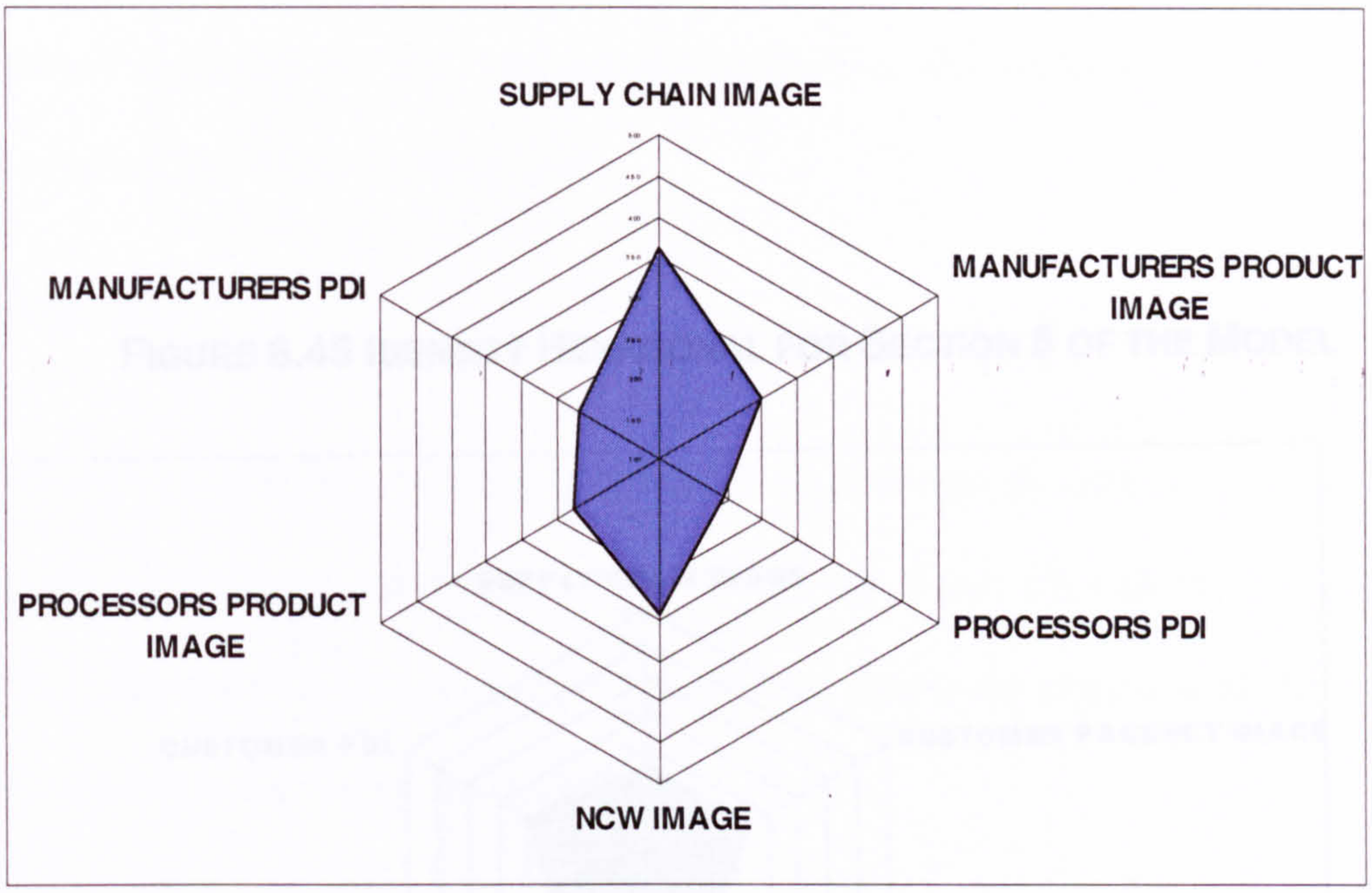


FIGURE 6.44 IDENTITY HEXAGON FOR SECTION 4 OF THE MODEL

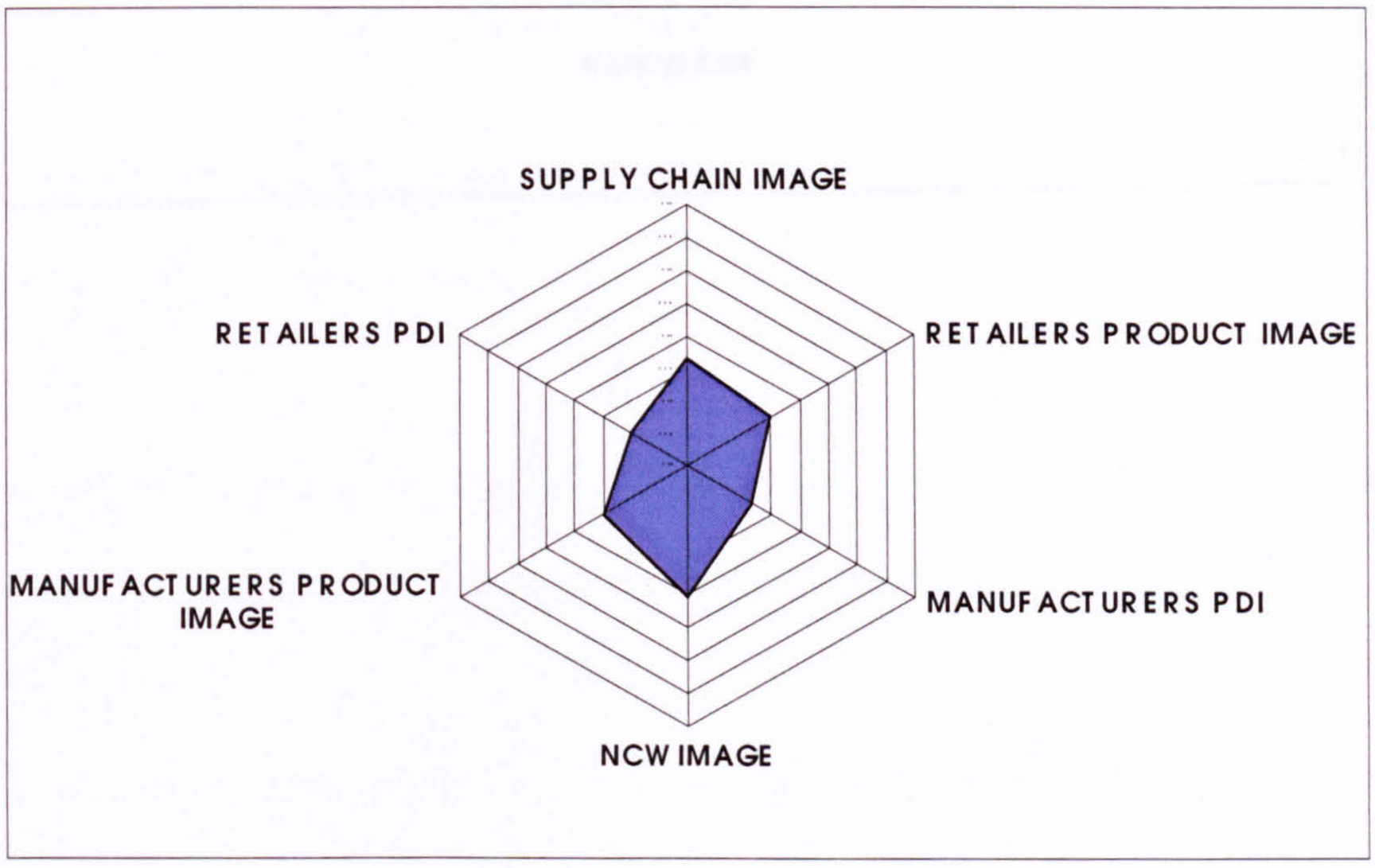
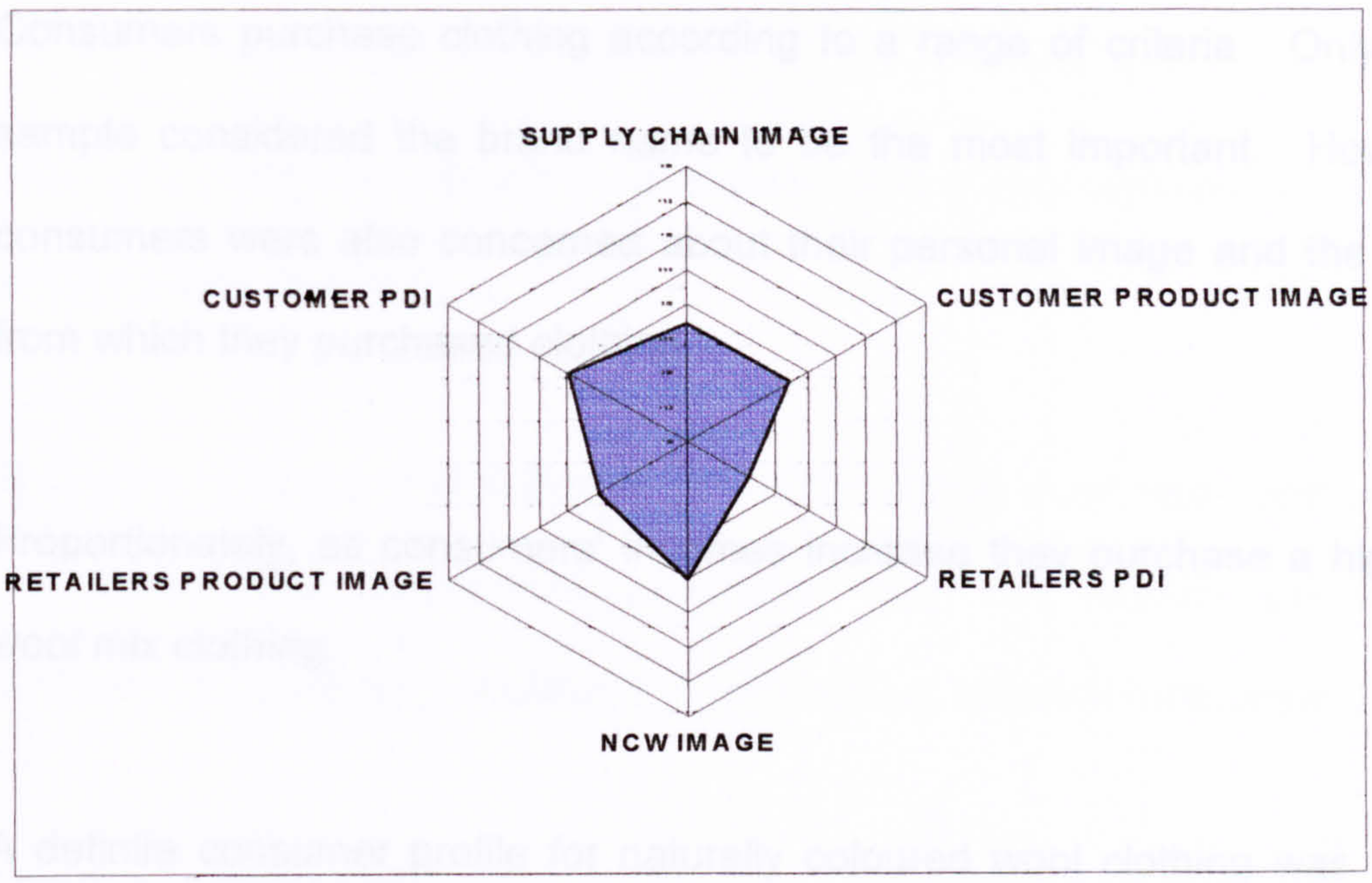


FIGURE 6.45 IDENTITY HEXAGONAL FOR SECTION 5 OF THE MODEL



6.5 CHAPTER SUMMARY

This chapter has discussed in detail the findings of the empirical research and where necessary a rationale for the methods employed for the statistical analysis performed. To summarise the main findings are:-

- **CONSUMER**

1. Consumers purchase clothing according to a range of criteria. Only 15% of the sample considered the brand name to be the most important. However, these consumers were also concerned about their personal image and the store image from which they purchased clothing.

2. Proportionately, as consumers' incomes increase they purchase a higher level of wool mix clothing.

3. A definite consumer profile for naturally coloured wool clothing was identified as 45+, outdoor, sociable person.

4. On the whole there is a negative divergence of opinion between individual and 3rd person consumers when selecting the same garment.

5. Consumers are not highly involved with the fabric of the clothing they purchase.

- **SUPPLY CHAIN**

1. Farmers do keep their naturally coloured wool flocks for non-profit related reasons.

2. There is a similar trend to other academic research highlighting the reluctance of farmers to form co-operative organisations.

3. A high level of relationship marketing was identified across the supply chain.

4. The purchasing decision within the supply chain is very complex, with as many as 5 people being involved.

5. The general trends of attitudes to across the supply chain were split into two being the farmer/wool buyer/wool processor and the manufacturer/retailer end. Consumers, however, consistently held the most negative attitudes to all questions.

6. There is a high level of purchase decision involvement at all stages of the supply chain.

The chapter was concluded by applying the findings to the systems supply chain conceptual model for brand identity. Attitudes to and perceptions of others in the supply chain varied depending on whether a direct relationship occurred between the two parties. This provides some indication of the lack of understanding that occurs across the supply chain. If any form of collective marketing is to be undertaken then

elimination of these attitudes is paramount. Across the supply chain there is generally a positive attitude to wool clothing in general and naturally coloured wool in particular. This optimism, however, does not apply to end consumers who are neutral at best to the fabric of their clothing.

These research, therefore, suggests that there are many challenges to overcome to ensure a continual clothing market for naturally coloured wool. A wide range of marketing strategies will have to be employed to ensure success.

6.6 REFERENCES

Assael, H., (1998), *Consumer Behaviour & Marketing Action*, 6th edition, South Western College Pub., Cincinnati Ohi.

Biel, A., (1992), How Brand Image Drives Brand Equity, *Journal of Advertising Research*, Vol. 32, pt. 6, pp 6 – 12.

Hair, J.F.; Anderson, R.E.; Tatham, R.L.; Black, W.C., (1998),*Multivariate Data Analysis*, 5th edition, Prentice Hall, New Jersey.

Kaperfer, J.N., (1997), *Strategic Brand Management: Creating & Sustaining Brand Equity Long Term*, Kogan Page, London.

Keller, K.L., (1993), Conceptualizing, Measuring and Managing Customer-Based Brand Equity, *Journal of Marketing*, Vol. 57, Jan, pp 1 – 22.

Nunnally, J.C., (1967), *Psychometric Theory*, McGraw Hill Book Company, New York.

CHAPTER SEVEN

7.0 INTRODUCTION

This thesis has investigated the essence of the brand identity concept, and how it is applied throughout the British naturally coloured wool, textile supply chain. There were several gaps in the literature identified. These included the lack of a definition of the commodity/producer brand; there had been little empirical research into brand image and a scarcity of research encompassing a whole supply chain in relation to branding. By applying a systems approach to marketing and through a cross supply chain survey, focus groups and in-depth interviews, disparities in 'buyer' perceptions of naturally coloured wool have been identified. These perceptions have assisted in mapping brand identity and marketing operations across the supply chain. The empirical research findings have been discussed in the previous chapter. This chapter summarises these findings, posits how a coherent brand identity may be developed and concludes the study. In addition, limitations of the research and details for further research needed are outlined.

7.1 SUMMARY OF FINDINGS

- **BACKGROUND TO THE RESEARCH**

The research domain of the British naturally coloured wool textile supply chain was selected to enable an understanding of the elements of brand identity and how they relate to a supply chain. During this research a number of themes were exhibited: -

1. From an analysis of the world fibre industry, it is apparent that there is still growth and demand for wool clothing products throughout the world (Chapter 2).
2. The American market is a possible marketing opportunity for British wool (Chapter 2).
3. The commodity price for British naturally coloured wool is currently extremely low (3 pence per kilo) (Chapter 2)
4. A boundary between agricultural and general marketing remains. An effect of this situation is that farmers are generally behaving in either of two ways: by not becoming involved in any of the value added activities; or trying to obtain value added by becoming more involved with later stages of production (chapter 3).
5. Horizontal marketing organisations although not favored by UK farmers could assist in the creation of added value earlier in the supply chain (Chapter 3).
6. Naturally, coloured wool farmers can be generalised as 'hobby' farmers. As such, they are relatively uncommercial in attitude towards their flocks but they do require a reasonable return on their investment (Chapter 3).
7. Currently the loss of the breed identifier at the wool sorting stage makes it an undifferentiated product (Chapter 2). In order for this product to succeed, consumers must see that there is something different or special about the product.

Although the British textile industry is currently in decline, there are still market opportunities both within the UK and global market for naturally coloured wool. The limiting factors for this product include the fragmented nature of the supply chain, the lack of demand at auction and the reluctance by processors to handle the wool. As a result, consumers possess a limited awareness of the product. It was, therefore, of key importance to investigate the actual perceptions of the product across the supply chain to identify where push or pull marketing activities could be applied to increase demand.

To address this issue, it was decided to employ perception and image of the brand identity of naturally coloured wool as the crucial factor in buyer choice throughout the supply chain. An extensive literature research failed to uncover any in-depth discussion on cross supply chain brand identity. As a result, studies of specific theoretical areas within agricultural and general marketing relating to the supply chain have provided a framework for the research.

From the issues outlined above, the following key hypotheses were addressed with a six-stage equivalent supply chain survey:

1. There is a negative perception of naturally coloured wool held by both organisational and consumer purchasers throughout the supply chain.
2. Within the textile supply chain, relationship marketing does take place

- **SUMMARY OF RESULTS**

Before images and perceptions of brand identity could be investigated, a measurement instrument had to be created. The first significant result, therefore, was the creation of a valid, reliable and cross supply chain equivalent measurement of brand identity. The construct comprised of five dimensions, which have been validated across the supply chain in relation to wool clothing, namely: -

- Purchase involvement
- 'Buyer' attitudes to naturally coloured wool
- Buyer/Seller attitudes to each other
- Relationship marketing within the supply chain
- Importance of brand identity to 'buyers'

Scale development and validation resulted in an operational definition of brand identity:

Brand identity is the extent to which its compositional facets such as brand image, brand personality, user image etc., are combined in the mind of the buyer. Not only do these perceptions vary over time but also brand identity is one of the major contributors when purchase decisions are made.

The second result from the research was the creation of a reliable and valid industry sampling frame. This was supplemented by the development of a consumer quota sample comparable to national statistics.

The two key hypotheses were broken into 6 sub-hypotheses and 5 propositions. Figure 7.1 depicts the results of the null hypothesis tests.

FIGURE 7.1 TESTING THE NULL HYPOTHESES

Number	Null Hypotheses	Decision	State of Nature
1	Consumers perception is that all wool clothing is easy to obtain	**Accepted**	Consumers believe that wool clothing is plentiful in retail outlets
2	Intrinsic and extrinsic attributes of wool clothing are not understood by consumers	**Rejected**	All the intrinsic and extrinsic attributes are understood by consumers
3	There is not a significant difference in opinion between parties in the supply chain	**Rejected**	There are significant differences in individual perceptions of others attitude to wool in the supply chain
4	Characteristics of a typical wool clothing purchaser cannot be identified by separate groups across the supply chain	**Rejected**	A definite typical consumer can be identified
5	Across the supply chain stores in which 'I' shop which sell wool clothing are not seen as being cool and trendy	**Rejected**	For the individual shopper the store which they shop in are always cool and trendy
6	There is not a divergence of opinion across the supply chain on store attributes when the 'individual' purchases wool clothing	**Accepted**	There are store attributes that are considered similar across the supply chain

To summarise, four hypotheses (2,3,4,5) proved to be rejected across the supply chain. This result, highlights that purchasers from any point in the supply chain understand the general properties and also have similar views as to the types of outlets and person who purchases wool clothing. However, although the results showed homogeneity of opinions when asked about their own attitudes a starkly different result was achieved when asked about the views of others. Specifically, as shown by hypotheses 3, there were major differences of opinion when each 'buyer' was asked how they perceived others in the supply chain. This disparity may have a major causal effect of how purchasing behaviour is undertaken through the supply chain. Further research needs to be undertaken to fully understand these effects. The two hypotheses accepted were that purchasers believe that wool clothing is plentiful

within retail outlets and that retail stores which sell wool clothing were observed as possessing similar attributes by the research respondents. If this product is to be marketed based on being unique and in specialised outlets, then it will be important to ensure that consumers do not classify this product with general wool clothing.

FIGURE 7.2 RESULTS OF THE FINDINGS OF THE PROPOSITIONS

Number	Propositions tested by findings	Decision	State of Nature
1	The brand name is the most important criteria in consumer purchase decisions	**False**	For most people, cost is the most important criteria in consumer purchase decisions
2	1st person perceptions of naturally coloured wool cannot be identified across the supply chain	**True**	The research did identify peoples perceptions to naturally coloured wool
3	3rd person perceptions are the same as 1st person	**False**	Consumers do not hold similar perceptions to themselves when someone is purchasing wool clothing
4	Naturally coloured wool farmers keep sheep purely for financial purposes	**False**	They do not keep their sheep purely for financial gain
5	There is a high level of relationship marketing within this supply chain	**True**	There are many different types and levels of relationship marketing taking place in this supply chain

The findings of the 5 propositions illustrated in Figure 7.2 were divided into consumer and supply chain aspects. In relation to the consumer propositions (1 to 3), these highlighted that there was a discrepancy between people's perceptions of when they purchased wool clothing in comparison to another person. It was also uncovered that large proportions of the representative sample are not particularly interested in brand labels. This fact would have a major effect on any marketing campaign created for naturally coloured wool in not only educating the public about the product but also in trying to increase the publics interest in such branded labels.

Within the supply chain (propositions 4, 5) itself, naturally coloured wool farmers do not keep their sheep for purely financial reasons. This finding will obviously have an effect on their attitudes to collaboration for their wool marketing. Currently, there is a high level of relationship marketing between various stages of the supply chain and this could be employed to the advantage of the naturally coloured wool farmers.

The results of the literature review, cross supply chain survey, focus groups and in-depth interviews suggest that there are discrepancies of image and perception views of naturally coloured wool. Although there were more convergence of views than expected these were limited to certain areas of the supply chain. As a result, the author suggests that it will be necessary to alter the non-positive views of naturally coloured wool before the development of a coherent brand identity can be achieved across the supply chain.

The research identified a divergence of opinion by consumers, in relation to the importance of brand names when purchasing wool clothing. For one group, the important factors were price, the store, style of clothing and personal image, the environmental tag and general advertising was considered very unimportant by these general end consumers. The second group, who are much smaller in size, considered brand name as of the utmost importance and were more interested in advertising.

A definitive end consumer purchaser of wool clothing was identified as older (45+), who either works outdoors, has outdoor interests or pretensions, who is optimistic and sociable. For this person the naturalness of coloured wool had positive connotations

and the individual nature of the product material fitted this individual's sense of not wanting to be one of the crowds.

There is wide understanding of wool garment properties such as warmth and in relation to the consumer perspective, all responses illustrated a positive trend to wool clothing. There is also a general belief that this industry is profitable and a good investment. Finally the results of the purchase decision involvement provided some unexpected results with organisational buyers being highly involved with their purchases, where an identifiable brand name and source of supply would provide them with a guarantee of quality and ease of purchase, but consumers have limited involvement with the fabric from which their garments are made. Although overall end consumers hold positive images and perceptions of naturally coloured wool, this lack of involvement currently results in this aspect not significantly affecting their purchasing decision. There are several alternatives to this dilemma firstly to raise the awareness of the general public through co-branding of the importance of the fabric when making a purchase decision, through education and selective advertising and secondly for the public to appreciate environmental impact of not supporting British wool.

7.2 LIMITATIONS

Methodological and theoretical limitations have been addressed throughout the main body of the thesis and are summarised below:

- **SPECIFICATION ERRORS**

The branding concept encompasses an extensive sphere of understanding. To identify consumer understanding of brand identity, a particular model/theory needed to be selected for operationalisation. Brand perceptions and image were identified as appropriate in terms of identifying buyer understanding of brand identity. The lack of consideration of the other facets of brand identity is recognised as a limitation of this research.

Although brand identity was considered as a whole, only the brand perception and image aspect of the process could be practically selected for further investigation through empirical research. The variables selected are particularly pertinent for the development of brand identities and are widely considered as an important aspect of buyer behaviour.

- **DIRECTIONS OF CAUSALITY**

The research resulted in the development of a contextual model. This model identified the causal relationships between the 'buyers' across the supply chain. The model indicates that understanding of the brand identity is formed from perceptions from all

parties in the supply chain and does not identify any specific order of these perceptions in the development of a personal understanding of the brand identity. This lack of specification is unsolvable and is thus a limitation of the research.

- **ASSESSMENT OF VALIDITY**

The research methods applied within this research were selected for their appropriateness to the research and recognised research procedures. To this end face validity, content validity and reliability including internal consistency were measured for the different scaling instruments. The results presented are both statistically and practically significant. Both probability and non-probability sampling techniques were applied in this study due to the difference in sample sizes, when conducting the empirical research. The consumer survey implemented was consistent with current shopping habits within the U.K. Assessment of the sample profile found that the sample was representative.

7.3 MANAGEMENT APPLICATIONS & IMPLICATIONS

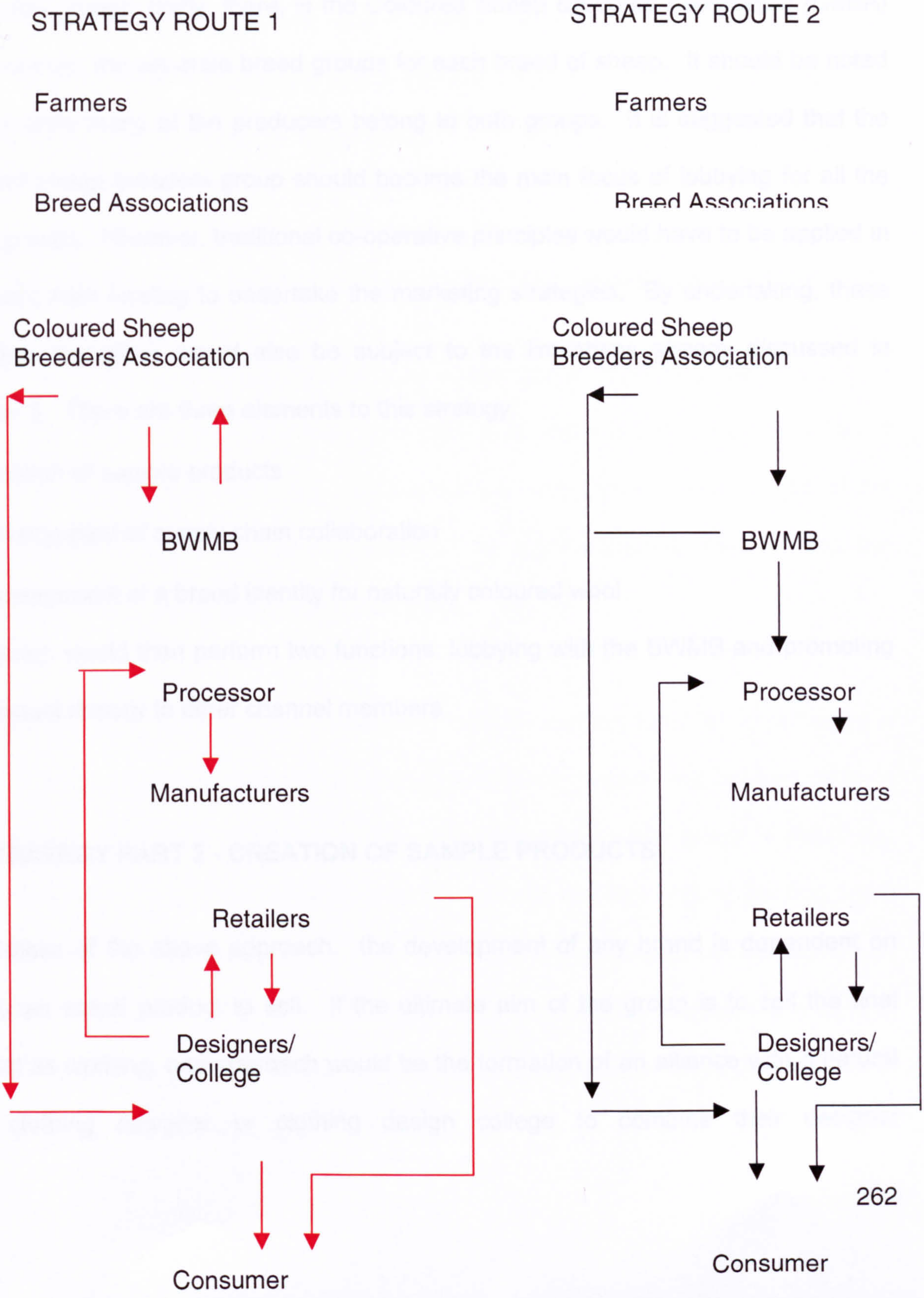
The cross supply chain framework developed in chapter 4, combined with the exploratory interviews and empirical findings in chapter 6, synthesises the results of the research study and posits for the development of a coherent cross supply chain brand identity strategy. The image and perceptions of the product must be seen as at least neutral and preferably positive by all 'buyers' in the chain to provide a definitive brand identity to consumers. Analysis of the brand supply chain model has highlighted that although there are neutral or positive attitudes to naturally coloured wool the other facets of the pyramid are not so consistent. Therefore, if this product is to succeed in the market place a range of strategies will have to be employed to overcome the non positive attitudes and perceptions and to develop the opportunities of the positive perceptions of naturally coloured wool.

Due to the high level of investment and the relatively long time to recoup these expenses, naturally coloured wool producers must feel confident that there is a profitable and sustainable market for their products. Through agricultural marketing theory, co-operative organisations can be viewed as a main vehicle to assist naturally coloured wool producers to attain a better marketing position. Infact co-operative organisations are already functioning at both the requisite and secondary level for naturally coloured wool, although there also needs to be improvement both in the management and scope of the interactions between the various parties involved. Therefore, the strategies suggested to overcome the weak brand perceptions currently held by 'buyers' in the supply chain are based on a collaborative approach amongst

the naturally coloured wool farmers to market their wool. The strategies also take into consideration the legal requirements of having to sell all fleeces to the BWMB. However, it should be noted that these strategies could not take place for all naturally coloured wool breeds until there is a change in the sorting techniques for coloured wool by the BWMB. Also, there is a necessity to create a new tag for both coloured sheep in general and for specific British coloured wool breeds. These collective labels created between the naturally coloured wool producers and the British Wool Marketing Board, through co-operative marketing could be a valid technique to change the brand image of both the market sector, the naturally coloured wool clothing or general product category.

It should be noted that with the current state of the textile market the naturally coloured wool producers will have to initially champion the brand identity development with the BWMB. Once the fibre can be identified and labelled as such it will then be necessary to find a designer champion to assist the product through the supply chain. Figure 7.3 suggests two possible scenarios. The first considers that the BWMB will continue not to proactively market naturally coloured wool. While the second illustrates their committed assistance. Due to the BWMB contacts and high profile within the industry, the preferred route would be to proceed with their assistance as in strategy flow 2. However, provided that the Coloured Sheep Breeders Association (CSBA) were prepared to fund this project themselves, they could still commence with stages 1 and 2 of strategy flow 1. If successful, the CSBA could then attempt to alter the BWMB opposition for further collaboration within the supply chain (See Figure 7.3).

FIGURE 7.3 SUGGESTED STRATEGY ROUTES FOR NATURALLY COLOURED WOOL



- **STRATEGY PART 1 – DEVELOPOMENT OF THE NATURALLY COLOURED WOOL CO-OPERATIVE**

There already is in existence within the naturally coloured wool producers two distinguish groups: firstly, there, is the Coloured Sheep Breeders Association (CSBA) and secondly, the separate breed groups for each breed of sheep. It should be noted that currently many of the producers belong to both groups. It is suggested that the coloured sheep breeders group should become the main focus of lobbying for all the breed groups. However, traditional co-operative principles would have to be applied in order to obtain funding to undertake the marketing strategies. By undertaking, these principles the group would also be subject to the limitations already discussed in Chapter 3. There are three elements to this strategy:

- Creation of sample products
- Development of supply chain collaboration
- Development of a brand identity for naturally coloured wool

This group would then perform two functions: lobbying with the BWMB and promoting the product directly to other channel members.

- **STRATEGY PART 2 - CREATION OF SAMPLE PRODUCTS**

Regardless of the above approach, the development of any brand is dependent on having an actual product to sell. If the ultimate aim of the group is to sell the final product as clothing, one approach would be the formation of an alliance with a natural fibre clothing designer or clothing design college to combine their designer

requirements in the original processing of the wool. By undertaking, a co-operative approach with this link in the supply chain offers many specific benefits. A sample of up to date fashion clothing would be developed, for use as a marketing aid for showing the processors, manufacturers and retail buyers how fashionable the garments could be. The publicity relating to any shows where the clothing was displayed would provide useful front of mind consideration and demand for the products by consumers who are particularly interested in brand labels.

- **STRATEGY PART 3 – DEVELOPMENT OF SUPPLY CHAIN COLLABORATION**

If the BWMB and or the CSBA undertake the suggestion in strategy 2, they could then use the samples as part of their marketing pitch to a previously identified selection of the textile supply chain. Also, the retail buyers will have become more aware of the final products through design show publicity. As a consequence, they will ask the manufacturers to make similar clothing for them.

In order for this to succeed, the BWMB and CSBA must act together in providing a collaborative approach to funding the development of the product and brand through a strategy such as pooling of resources or co-branding with a major player in the chain. The benefit of this approach would be that the reduced risk for creating the first batch of clothing for offer to consumers. The additional benefit would be the combined corporate identities of the firms involved providing reassurance of quality and style to the retail buyers. Also, there would be funding for a public wide promotion campaign on the launch of the fibre and fashion collection.

- **STRATEGY PART 4 – DEVELOPMENT OF A CONSISTENT BRAND IDENTITY**

As a consequence of the marketing strategies mentioned above there would be a creation of a positive brand identity between each of the members of the supply chain. The accumulative effect would be a raising of awareness of the product by consumers. By prominently advertising the fabric of the garments, this would also increase the consumers' involvement with the fabric of their garments. Provided that the quality, style etc are of a high standard this will create a more positive image of the brand and place this product in the consumer selection list for future clothing purchases.

7.4 FURTHER STUDY

This research has identified the current state of the British naturally coloured wool market, which has resulted in the development of a cross supply chain systems model. This model has highlight the causal relationships between the 'buyers' across the supply chain and has suggested key brand facets to be included in the development of a consistent brand.

Due to the extensive nature of the study, further research is required to test the validity of the model preferably within a different commodity supply chain. The research also highlighted that relationship marketing was taking place within the supply chain. Further investigations into the actual buyer/seller relationships would provide a deeper understanding of this relatively new marketing area. This would also provide more information on the causality effects of the supply chain on the model.

7.4 CONCLUSIONS

Buyers across the supply chain all possess a brand identity for the separate breed identifiers of naturally coloured wool, for example Shetland. To increase market opportunity, it is necessary for those working across the supply chain to develop a coherent and unique brand, which can be applied as the product moves through the chain. The British Wool Marketing Board already operates a successful joint marketing scheme with carpet manufacturers. A suggestion is made that a similar scheme should be introduced with the textile supply chain, which would involve co-participating with companies across the supply chain. The umbrella brand for these products should include the terms 'naturally coloured wool' while also identifying the breeder identifier for each product for example Shetland, Naturally Coloured British Wool. This would provide source visibility for the product in the minds of end consumers and also make it more difficult for substitutes to be used during production.

If such a proactive approach is not taken then the future of, British naturally coloured wool is bleak. Naturally, hobby farmers without some form of financial return on investment cannot indefinitely support coloured wool. Ultimately, this could result in an even larger loss of British sheep breeds, with at the minimum more breeds joining the at risk register of the Rare Breeds Society.

BIBLIOGRAPHY

Checkland, P., (1998), *Information Systems: Making sense of the field*, J. Wiley & Sons, Chichester.

Corbett, C.J., Blackburn, J.D., Van Wassenhove, L.N., (1999), Case Study Partnerships to Improve Supply Chains, *Sloan Management Review*, Summer, pp 71 – 82.

Crawford, C,M., (1985), A New Positioning Typology, *Journal of Product Innovation & Management*, Vol. 2, pt. 4, pp 243 – 253.

Croston, D., (1995), MLC Breeding Strategy for the British Sheep Industry, *World Sheep and Wool Congress*, 2, 23, pp 1 –5.

De Chernatony, L., (1990), Appreciating Brands as Assets through using a 2 Dimensional Model, *International Journal of Advertising*, Vol. 9, no.2, pp 111 – 119.

De Chernatony, L., (1989), The Varying Nature of Brands as Assets: Theory & Practice Compared, *International Journal of Advertising*, Vol. 8, no. 4.

De Chernatony, L., (1989), Marketer's & Consumer's Concurring Perceptions of Market Structure, *European Journal of Marketing*, Vol.23, pt. 1, pp 7 – 16.

De Chernatony, L., (1996), 2001 the Brand Management Odyssey, *Open University Business School*, Working Paper, no. 10.

Dugree, J., (1990), Qualitative methods for developing advertising that makes consumers feel 'hey that's right for me', *Consumer Marketing Journal*, Vol. 7, no 1, Winter.

Easterby-Smith M., Thorpe R., Lowe A., (1991), *Management Research, An Introduction*, Sage Publications Ltd, Bristol.

Economists Advisory Group, (1995), *Co-operative marketing and joint trading for small firms.*

Elliot, R., (1994), Exploring the Symbolic Meaning of Brands, *British Journal of Management*, Vol. 5, June, pp 513 – 519.

Farquhar, P.H.; Ijiri, Y., (1993), A Dialogue on Momentum Accounting for Brand Management, *International Journal of Research in Marketing*, March.

Ford, D., (1980), The Development of Buyer-Seller Relationships in Industrial Markets, *European Journal of Marketing*, Vol. 14, pt. 5, pp 339 – 353.

Harper, M., (1992), Critical factors for success of co-operatives and other group enterprises, *Small Enterprise Development*, Vol. 2 no 1, March.

Galtung, J., (1970), *Theory and Methods of Social Research*, George Allen & Unwin, London.

Gattorna, J., (1995), Market Driven Branding, *Management Today*, Feb., pp 12 – 15.

Griffiths, C., (1992), Brand as Verb, *Admap*, July/August, pp 39 – 42.

Grossain, S., Kandiah, G., (1998), Reinventing values: the new business ecosystem, *Strategy & Leadership*, Nov/Dec, Vol. 26, Issue 5 pp 28 – 34.

Hart, C., (), *Doing a Literature Review: Releasing the Social Science Research Imagination*, Sage, London ****

Helgeson, J. G., (1994), Receiving and responding to a mail survey: a phenomenological examination, *Journal of the Market Research Society*, Oct, v36 n4 pp 339 – 488.

Helmberger, P., (1965), The Future of Agricultural Co-operatives, *Journal of Farm Economics*, Vol. 48 pt. 5 pp 1427 – 1435.

Hind, A. M., (1994), Co-operatives – under performers by nature? An exploratory analysis of co-operative and non co-operative companies in the agri-business sector, *Journal of Agricultural Economics*, 45 (2) pp 213 – 219

Hoehna, B.; Robbins, L.; Anschel, K., (1980), Benefits, costs & Distribution Consequences of a Publicly assisted Marketing Co-operative, *American Journal of Agricultural Economics Association*, 62 2, May pp 211-271.

Hoos, S., (1959), The Advertising & Promotion of Farm Products, *Journal of Farm Economics*, Vol. 41, pp 349 – 363.

Hunt S. D.,(1991), *Modern Marketing Theory. Critical Issues in the Philosophy of Marketing Science*, South-Western Publishing Co.

Hunt, S. D., (1993), Objectivity in Marketing Theory and Research, *Journal of Marketing*, 57, pp 76-91.

Issert, J., (1978), *The Legal Status of Agricultural Co-operatives in European Countries*, The Plunkett Foundation, No. 44.

Jacoby, J., (1984), Linking Brands & Retailer Images: Do the potential risk outweigh the potential benefits, *Journal of Retailing*, Vol. 60, pt. 2, pp 105 – 222.

John, D.R.; Loken, B., (1992), Diluting beliefs about family brands, when extensions have a negative impact, *Marketing Science Institute Report*, August, pp 92 – 122.

Kuper, A.; Kuper, J., (1996), *The Social Science Encyclopedia*, 2nd ed., Routledge, London.

Lafort, S.; Saunders, J., (1994), Managing Brand Portfolios: How the Leaders do it, *Journal of Advertising Research*, Sept/Oct., pp 64 – 76.

Lane, V.; Jacobson, R., (1995), Stock Market Reactions to Brand Extension Announcements: the effects of brand attitude & familiarity, *Journal of Marketing*, Vol. 59, Jan., pp 63 – 77.

Landeros, R.; Monezka, R.M., (1981), Co-operative Buyer/Seller Relationships & A Firm's Competitive Posture, *International Journal of Purchasing & Materials*, Vol. 25, pt.3, Autumn, pp 9 –17.

Leclerc, F.; Schmitt, B.H.; Dube, L.,(1994), Foreign Branding & its effects on Product Perceptions & Attitudes, *Journal of Market Research*, Vol. XXXI, May, pp 263 – 270.

Lehaney, B., Clarke, S., (1995), A framework for research evaluation in management science, *Journal of Educational Management*, Vol. 9, Issue 4

Leon, J.,L.; Olabarri, E., (1993), The validity of consumer predicting variables used in marketing research, ESOMAR Awards, *Marketing and Research Today*, February

Leedy, P.D., (), *Practical Research: Planning and Design*, 5th edition, ***

Levitt, T., (1980), Marketing Success through Differentiation of Anything, *Harvard Business Review*, Jan/Feb., pp 83 – 91.

Low, G.S.; Fullerton, R.A., (1994), Brands, Brand Management & the Brand Manager System: a critical historical evaluation, *Journal of Marketing Research*, Vol. XXXI, May, pp 173 – 190.

Mc Crea, N., (1993), Umbrella & Pillar Branding: The Jacobs Case Study, *British Food Journal*, no. 5, pp 6 - 11.

Mc Clure, P.; Ryan, J., (1968), Differences between Retailers & Consumers' Perceptions, *Journal of Market Research*, no. 5, pp 35 – 40.

Miles, B., Huberman, A. M., (1994) *Qualitative Data Analysis*, 2nd edition Sage, London

Moran, W., Blunden, G., Bradly, A., (1996), Empowering Family Farms Through Co-operatives and Producer Marketing Boards, *Economic Geography*, 72 (2), pp 161 - 177

Morgan, G., *Imaginization the art of Creative Management*, Sage Publications Ltd., London.

Nancarrow, C.; Avi Shanker A. M., (1996), Bridging the great divide the transfer of techniques, *Marketing Intelligence*, 14/6 pp 27-37

Offiongondon, A.M., (1988), Towards Improved Agricultural Products Marketing Strategy, *European Journal of Marketing*, 22, 6, pp 7 – 20

Ohanian, R., (1990), Construction and validation of a scale to measure celebrity endorsers' perceived expertise, trustworthiness, and attractiveness, *Journal of Advertising*, Summer, v 19, n3, pp 39 – 53.

Onkvisit, S.; Shaw, J., (1988), The International Dimension of Branding Strategic Considerations & Decisions, *International Marketing Review*, Vol. 6, pt. 3, pp 22 – 34.

Outhwaite, W.; Boltonmore, T., (1993), *The Blackwell Dictionary of 20th Century Social Thought*, Blackwell Publishers, Oxford.

Pickard D., 1970, Factors affecting success and failure in farmers' co-operative associations, *Journal of Agricultural Economics*, vol 21 pp 105 – 119.

Peter, P.,J., (1981), Construct Validity: A review of basic issues and marketing practices, *Journal of Marketing*, 18 May, pp133-145.

Rao, A.R.; Ruekert, R.W., (1994), Brand Alliances as Signals for Product Quality, *Sloan Management Review*, Fall, pp 87 – 97.

Reber, A.S., (1985), Penguin Dictionary of Psychology, Penguin, London.
Roberts, C.; Mc Donald, G., Alternative Naming Strategies: Family versus Individual Brand Names, *Management Decision*, 27, 6.

Sampson, P., (1993), A Better Way to Measure Brand Image, *Admap*, July/Aug., pp 19 – 23.

Sparks, L., (1994), Going, Going ….. Consumer Co-operation in Great Britain, *4th Triennial AMS/ACRA National Retailing Conference*, March.

Treadgold, T., (1999), Wool is Back? Maybe this time, *Business Review Weekly*, 21/32 pp 76 – 81.

Walters, M., (1994), *Modern Sociological Theory*, Sage Publications Ltd., London.

Walter, J.; Bacon, F., (1989), How designers & buyers evaluate brands, *Industrial Marketing Management*, Vol. 18, pp 81 – 89.

Williams, T., (1998), *Information Systems Methodologies: a framework for understanding*, Addison Wesley, Wokingham.

Woolley, M., (1992), Using statistics for desk research, Aslib Proceedings, Vol. 44 May, pp 227 - 233

APPENDICES

A:1

DESCRIPTION OF WOOL TYPES

Kemp

Kemp (which is short, coarse and white in colour) and hair fibres are both produced by primary follicles while the true wool is grown by the secondary follicles. Except for a few fabrics such as British tweeds, the presence of kemp is undesirable in textile manufacture. This is due not only because of its poor handling and dyeing characteristics but also because during the manufacture of yarn and cloth the tendency of kemp to break in carding spinning and weaving processes. This can be of considerable nuisance, creating fly (dust in the atmosphere) and wastage, it can even be a fire hazard.

Hair

Hair fibres possess an outer cuticle composed of scales which are arranged in such a way that the surface is smoother than those of the other wool fibre types (Ryder & Stephenson, 1968). The relatively smooth surface is able to reflect light, which imparts to these fibres a lustrous sheen, from which the term 'lustre longwool', is derived. Furthermore, the greater length of hair fibres is able to increase the strength of yarns in which they are included. Unlike Kemp, the properties of lustre and length have been exploited by textile manufacturers in attractive lustrous and hard wearing fabrics made from the lustre longwool fleeces, which typically contain high proportions of this type of hair.

True Wool

The term true wool can be used to distinguish the fibre grown by the second follicle. These fine fibres tend to be relatively short in length. Ryder (1994) states that 'fine wool grown by secondaries is the same whether it comes from the fleece of a hairy blackface, a semi-fine woollen down breed of the fine-woolled merino; fleeces can be distinguished only by their structure, not by individual fibres'. This has significant implications in the grading process of wool and its subsequent bailing for auction.

The density of follicles in the skin can identify fleece variation. There are variations between breeds and even between individual sheep. (Ryder, 1994). Wool follicles are curved and this is associated with the waviness or crimp of wool. The resilience of wool fibre is provided by the wool crimp and this property also allows air to be trapped when the wool is spun into yarn.

A2:

GLOBAL WOOL MARKET FIGURES

The table below identifies the world sheep population figures from 1990 to 19986. Although overall the total number of sheep have declined over the past six years the actual number per country lost is quite small. This illustrates that currently there is a strong demand for both sheep meat and wool throughout the world.

WORLD SHEEP POPLUATION (mHead)							
	1990	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**
China	112.8	111.6	117.4	127.3	140.4	131.0	129.0
Australia	170.3	138.1	132.6	120.9	121.2	120.2	117.9
USSR	138.6	122.0	112.7	90.5	74.3	62.5	53.6
Iran	44.6	49.7	50.3	50.9	51.5	52.0	53.0
New Zealand	57.9	50.3	49.5	48.8	47.4	46.9	45.6
Turkey	43.6	39.4	37.5	35.6	33.8	33.1	30.2
Pakistan	25.7	27.7	28.4	39.1	29.8	30.5	32.8
UK	**29.8**	**29.3**	**29.5**	**28.7**	**27.9**	**31.0**	**31.0**
South Africa	30.0	25.7	25.9	25.9	28.9	29.2	30.0
Others	532	505.8	416.6	495.6	497.5	530	533
Total	**1180.3**	**1099.6**	**1090.0**	**1063.3**	**1052.7**	**1066.4**	**1056.1**
SOURCE: FAO;GOSKOMSTAT							

Table 1: World Sheep Population 2000
(SOURCE: FAO;GOSKOMSTAT)

A2:

GLOBAL WOOL MARKET FIGURES

RAW WOOL DESTINATION : GREASY, SCOURED & CARBONISED 1996						
	Australia	Uruguay	South Africa	New Zealand	Argentina	TOTAL
WEST EUROPE						
Italy	69.2	1.3	2.6	6.5	5.9	85.5
Germany	26.5	0.1	6.0	2.2	2.4	37.2
France	22.9	2.4	2.4	10.8	5.9	44.4
UK	14.0	1.8	2.4	20.2	0.4	38.8
Belgium	3.0	0.2	0.4	7.4	1.2	12.2
Netherlands	9.0	0.3	0.0	0.2	0.3	9.8
Other	6.0	0.4	0.7	3.3	0.5	10.9
Total West Europe	150.6	6.4	14.1	50.5	16.7	238.3
ASIA						
China	102.7	2.7	0.0	49.0	0.7	155.1
Japan	31.4	0.1	0.1	10.6	0.6	42.8
Taiwan	37.6	0.0	0.7	5.3	0.1	43.7
South Korea	22.0	0.0	0.2	1.5	0.0	23.7
Other	45.9	0.6	0.4	17.6	0.2	64.7
Total Asia	239.6	3.4	1.4	84.0	1.6	330.0
EAST EUROPE						
Czech Republic	3.6	0.0	0.5	0.2	0.0	4.3
Poland	1.0	0.0	0.0	0.1	0.0	1.1
USSR	0.9	0.0	0.0	0.1	0.0	1.0
Other	0.4	0.1	0.0	0.2	0.0	0.7
Total East Europe	5.9	0.1	0.5	0.6	0.0	7.1
USA	19.8	0.7	0.5	8.0	0.2	29.2
Canada	0.0	0.0	0.1	0.3	0.0	0.4
Other	0.6	1.0	0.1	0.5	3.0	5.2
Total	20.4	1.7	0.7	8.8	3.2	34.8
Developing Countries	25.7	0.0	0.4	34.3	3.0	63.4
Other	0.7	0.0	0.0	10.0	0.0	10.7
Total clean equivalent	442.9	12.0	17.1	1882.0	24.5	2378.5

Table 2: Raw Wool Destination, 1996: Source: IWS1997

A2:

GLOBAL WOOL MARKET FIGURES

VIRGIN WOOL AT SPINNING STAGE				
% MARKET SHARE HELD				
	1992	1994	1996	1998
WEST EUROPE	28.5	29	25	28
Italy	40	42	44	42
UK	**16**	**19**	**20**	**18**
Germany	13	12	9	11
Belgium	5	4	5	6
EAST EUROPE	12.9	7	7	8
FAR EAST	32	33	35	28
China	57	66	67	73
Japan	28	22	17	16
Others	26.3	31	33	33
Total	**100**	**100**	**100**	**100**

Table 3: Virgin Wool AT Spinning Stage
Source: IWS, 2000

This table illustrates that the UK is increasing it's percentage usage of wool within the Western European spinning industry. Even though the total wool processed by Europe is declining

A2:

GLOBAL WOOL MARKET FIGURES

VIRIGIN WOOL AT MANUFACTURING STAGE				
% MARKET SHARE HELD				
	1992	1994	1996	1998
WEST EUROPE	25	24	19	22
Italy	34	31	29	27
UK	18	21	24	21
Germany	12	11	8	12
Belgium	6	5	6	8
EAST EUROPE	13	8	9	10
FAR EAST	33	36	38	29
China	58	67	68	74
Japan	27	22	17	17
Others	29	32	34	39
Total	100	100	100	100

Table 4: Virgin Wool AT Manufacturing Stage
Source : IWS, 2000

This table illustrates that the UK is increasing it's percentage usage of wool within the Western European manufacturing industry. Even though the total wool processed by Europe is declining

A2:

GLOBAL WOOL MARKET FIGURES

VIRIGIN WOOL AT RETAIL STAGE				
% MARKET SHARE HELD				
	1992	1994	1996	1998
WEST EUROPE	32	32	27	32
Italy	23	20	16	17
UK	15	18	19	19
Germany	24	25	26	25
EAST EUROPE	12	6	6	7
FAR EAST	29	32	35	24
China	48	51	55	57
Japan	39	38	29	37
Others	27	30	32	37
Total	100	100	100	100

Table 5: Virgin Wool at Retail Stage
Source: IWS, 2000

Summary

Germany is the largest consumer of virgin wool at the retail stage, this market has continued to grow slightly.

China has the largest percentage consumption in the world and demand is continuing to grow.

Japanese market for finished wool garments, which is one of Britain's largest export markets for wool, is declining rapidly since 1992 by 10%.

The previous point suggests that in order for British Manufacturers/Retailers to maintain and develop their markets new outlets/'countries', for their products will have to be found.

A2:

GLOBAL WOOL MARKET FIGURES

CONSUMPTION OF MEN'S OUTWEAR					
MKg GARMENT WEIGHT					
	1992	1993	1994	1995	1996
FRANCE	37	36	38	37.4	36.1
GERMANY	83.3	84.5	84.1	79.6	78.7
ITALY	53.1	47	46.8	43.7	43.2
JAPAN	54.4	57.1	57.6	64	57.8
UK	50.7	50	48.2	46.1	49.6
USA	282	294	340.4	327.3	347.2
TOTAL	560.4	568.6	615.1	598.1	612.7

Table 6: Consumption of Men's Outerwear
Source: IWS, 1997

CONSUMPTION OF WOMEN'S OUTWEAR					
MKg GARMENT WEIGHT					
	1992	1993	1994	1995	1996
FRANCE	66.4	70.2	74.6	76.1	79.9
GERMANY	160.7	161.4	161.3	155.7	156.6
ITALY	66.8	65.1	62.5	60.5	59.9
JAPAN	116.6	111.5	113.6	114.8	109.3
UK	87.9	85.4	84.7	84	87.2
USA	463.8	503	516.4	510.8	516.1
TOTAL	962.2	996.6	1013.1	1001.9	1009

Table 7: Consumption of Women's Outwear
Source: IWS, 1997

CONSUMPTION OF ADULT KNITWEAR					
MKg GARMENT WEIGHT					
	1992	1993	1994	1995	1996
FRANCE	66.4	70.2	74.6	76.1	79.9
GERMANY	160.7	161.4	161.3	155.7	156.6
ITALY	66.8	65.1	62.5	60.5	59.9
JAPAN	116.6	111.5	113.6	114.8	109.3
UK	87.9	85.4	84.7	84	87.2
USA	463.8	503	516.4	510.8	516.1
TOTAL	962.2	996.6	1013.1	1001.9	1009

Table 8: Consumption of Adult Knitwear
Source: IWS, 1997

A2:

GLOBAL WOOL MARKET FIGURES

Summary

The previous tables illustrate that the USA consumes the largest proportion of wool garments by weight. This is possibly a new market opportunity for British manufacturers/retailers, which Britain at present does not appear to be serving.

Due to changes in the data presented the following tables show the consumption figures for only four countries

CONSUMPTION OF MEN'S OUTER WEAR					
MKg GARMENT WEIGHT					
	1994	1995	1996	1997	1998
GERMANY	84.1	79.6	78.7	73.5	72.5
ITALY	46.8	43.7	43.2	42.4	45.0
JAPAN	57.6	64.0	57.8	55.7	49.6
USA		317.0	343.6	383.0	389.6
TOTAL		504.2	523.3	554.6	556.7

Table 9: Consumption of Men's Outer wear
Source: IWS, 2000

CONSUMPTION OF WOMEN'S OUTER WEAR					
MKg GARMENT WEIGHT					
	1994	1995	1996	1997	1998
GERMANY	161.3	155.7	156.6	149.4	145.8
ITALY	62.5	60.5	59.9	60.1	62.7
JAPAN	113.6	114.8	109.3	107.4	94.6
USA		511.1	537.3	558.2	655.4
TOTAL		842.2	863.1	875.1	958.5

Table 10: Consumption of Women's Outer Wear
Source: IWS, 2000

CONSUMPTION OF ADULT KNIT WEAR					
MKg GARMENT WEIGHT					
	1994	1995	19968	1997	1998
GERMANY	74.2	66.9	71.1	75.0	72.1
ITALY	40.2	39.7	38.8	37.5	38.9
JAPAN	50.3	50.4	49.5	49.0	44.5
USA		78.0	77.6	94.5	105.3
TOTAL		234.9	237.1	256.0	260.8

Table 11: Consumption of Adult Knitwear
Source: IWS, 2000

A3:

BRITISH FLEECE WOOL GRADES (CONTAINING 'COLOURED' WOOL IN THE DESCRIPTION)

BWMB GRADE	DESCRIPTION	INCLUDED IN RESEARCH
290	Fine and Cheviot Light Grey	
291	Fine and Cheviot Dark Grey/Black	
350	Selected Jacob	YES
351	Jacob	YES
390	Halfbred Light Grey	
390F	Fine and Medium Light Grey Damaged	
390V	Fine and Medium Light Grey Moiety	
391	Halfbred Dark Grey/Black	
391F	Fine and Medium Dark Grey/Black Damaged	
391V	Fine and Medium Dark Grey/Black Moiety	
490	Cross and Masham Light Grey	
490F	Cross and Masham Light Grey Damaged	
490V	Cross and Lustre Light Grey Light Moiety	
491	Cross and Masham Dark Grey/Black	
491F	Cross and Lustre Dark Grey/Black Damaged	
491V	Cross and Lustre Dark Grey/Black Moiety	
492	Blueface, Teeswater, Wensleydale Dark Grey and Black	YES
620V	Cheviot and Cheviot Cross Light Moiety	
630	Shetland White	YES
631	Shetland Moorit	YES
633	Shetland Cross	YES
636	Orkney White and Near White	YES
638	Orkney Light Grey	YES
639	Orkney Dark	YES
657R	Radnor Heavy Moiety	
657V	Radnor Light Moiety	
660	Selected Welsh	
662	Selected Deep Welsh	
663	Welsh Cast	
663F	Welsh Damaged	
663H	Welsh Excess Marks	
663R	Welsh Heavy Moiety	
663V	Welsh Light Moiety	
666	Red Kempy and Light Grey Welsh	
666F	Red Kempy and Light Grey Welsh Damaged	
667	Red Kempy and Light Grey Welsh Light Moiety	
668	Red Kempy and Light Grey Welsh Heavy Kemp	

A3:

BRITISH FLEECE WOOL GRADES (CONTAINING 'COLOURED' WOOL IN THE DESCRIPTION)

668F	Red Kempy and Light Grey Radnor Damaged	
668V	Red Kempy and Light Grey Radnor Light Moiety	
689	Welsh Steel	
690	Dark Grey/Black Welsh and Radnor Cross	
690F	Black Welsh/Radnor Damaged	YES
690V	Black Welsh/Radnor Moiety	YES
691	Super Black Welsh	YES
704	Gritstone and Lonk Grey	
709	Swaledale and Dalesbred Grey	
709F	Swaledale and Dalesbred Grey Damaged	
709R	Swaledale and Dalesbred Grey Heavy Moiety	
709V	Swaledale and Dalesbred Grey Light Moiety	
710v	Swaledale and Dalesbred Moiety	
718	Light Herdwick	YES
719	Dark Hedwick	YES
719F	Herdwick Damaged	YES
719V	Herdwick Moiety	YES
719H	Herdwick Excess Marks	YES
732R	Blackface Heavy Moiety	
732V	Blackface Light Moiety	
733R	Blackface Rubby, Heavy Moiety	
733V	Blackface Rubby, Light Moiety	
790	Blackface Dark Grey/Black	
792	Scotch Grey	
792F	Scotch Grey Damaged	
792V	Scotch Grey Light Moiety	
793	Blackface Light Grey Hog Ewe and Wether Mattress	
794	Blackface Light Grey Hog Ewe and Wether	
794F	Blackface Light Grey Damaged	
794V	Blackface Light Grey Moiety	

The categories marked by 'YES' are those for which statistical and industry knowledge can be obtained. This is because of the fact that fleece is graded by quality including colour and the breed name identifier is lost. This has resulted in limited statistical/industry comment on many of the breed identifiers mentioned in the research.

B1: Qualitative V's Quantitative Data

Qualitative research is a mixture of the rational, explorative and intuitive, where the skills and experience of the researcher play an important role in the analysis of data. This important paradigm has its roots in sociology and anthropology (Skyes). Where the main emphasis, in these traditions is place on the acquisition of understanding or vestehen through immersion in the world-view of others (Skyes).

The next section of the research highlights the differences between qualitative and quantitative data collection.

Qualitative skills include: thinking in the abstract, stepping back and critically analysing situations, recognising and avoiding biases, obtaining valid and reliable information, having theoretical and social sensitivity and the ability to keep analytical distance while at the same time utilising past experience, and a shrewd sense of observation and interaction (van Maanen, 1983, Strauss and Corbin 1990). Qualitative methods of information collection are most useful when used to assist in the explanation and building of hypothesis. Many academics believe that both qualitative and quantitative methods are suitable for different stages of research and that these two approaches are complementary (Jones 1988, Jankowicz, 1991). On the basis of the possibility of applying these complementary approaches, the methodology for the research has been developed.

Qualitative and quantitative methods and techniques (Ghauri, Gronhaug & Kristianslurd, 1995)

Quantitative data is numerical in nature. Quantitative surveys procedures have been developed to produce the standardised, controlled set of measures deemed essential to the method: an answer and only one answer obtained for each question, and all questions asked of every respondent in an identical fashion intended to supply a standard stimulus (Galtung, 1950).

B2: Naturally Coloured Wool Surveys

Index

Consumer Questionnaire

Area _____

Respondent no.

0 [ ] 0 [ ] 0 [ ]
1 [ ] 1 [ ] 1 [ ]
2 [ ] 2 [ ] 2 [ ]
3 [ ] 3 [ ] 3 [ ]
4 [ ] 4 [ ] 4 [ ]
5 [ ] 5 [ ] 5 [ ]
6 [ ] 6 [ ] 6 [ ]
7 [ ] 7 [ ] 7 [ ]
8 [ ] 8 [ ] 8 [ ]
9 [ ] 9 [ ] 9 [ ]

Mark boxes boldly with a pencil, like this [■] DO NOT tick, cross or circle
DO NOT photocopy, fold, crease, punch holes or use staples

1 Approximately what percentage of the total wool clothing items you purchased last year were made from:

	1-10%	11-20%	21-30%	31-40%	41-50%	51-60%	61-70%	71-80%	81-90%	91-100%
100% wool	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Wool mixes	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

2 Where do you purchase most of your wool clothing eg. jumpers, suits etc? (Mark all that apply)

Marks & Spencer [ ]
Littlewoods [ ]
Local market [ ]
Next [ ]
Droopy & Browns [ ]
Warehouse [ ]
River Island [ ]
Laura Ashley [ ]
Burtons [ ]
The Suit Shop [ ]
Charity shops [ ]

Monsoon [ ]
Principles [ ]
BHS [ ]
C & A [ ]
John Lewis [ ]
Jumpers [ ]
Wallis [ ]
Evans [ ]
Country Casuals [ ]
Top Shop [ ]
Etam [ ]

Specialised clothing storer [ ]
Army & Navy Surplus [ ]
Richards [ ]
Debenhams [ ]
Selfridges [ ]
Harvey Nichols [ ]
Dicken & Jones [ ]
Mothercare [ ]
Milletts [ ]
Grieves & Hawks [ ]
Mail Catalogue [ ]

Other [ ] (please state) _____

3 When you select garments for purchase, from the many wool types and brands available in the market, would you say that:

	strongly agree	agree	neutral	disagree	strongly disagree
I would care a great deal as to which one I buy	[ ]	[ ]	[ ]	[ ]	[ ]

4 Do you believe that the various wool types and brands, available in the market, are:

	strongly agree	agree	neutral	disagree	strongly disagree
All very alike	[ ]	[ ]	[ ]	[ ]	[ ]

5 How important is it, for you, to make a right choice when purchasing wool garments?

	strongly agree	agree	neutral	disagree	strongly disagree
Extremely important	[ ]	[ ]	[ ]	[ ]	[ ]

6 When you make your selection of wool garments, how concerned are you about the outcome of your choice?

	strongly agree	agree	neutral	disagree	strongly disagree
Very much concerned	[ ]	[ ]	[ ]	[ ]	[ ]

7 How strongly do you believe that the following groups of people have similar beliefs to you, that the types and breeds of sheep's wool are very similar?

	strongly agree	agree	neutral	disagree	strongly disagree
Sheep farmers	[ ]	[ ]	[ ]	[ ]	[ ]
British Wool Marketing Board	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes Manufacturers	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes retailers	[ ]	[ ]	[ ]	[ ]	[ ]
Weaving mills	[ ]	[ ]	[ ]	[ ]	[ ]
Spinning mills	[ ]	[ ]	[ ]	[ ]	[ ]
People who wear wool clothing	[ ]	[ ]	[ ]	[ ]	[ ]

Consumer Questionnaire

8 When you consider retail outlets that sell garments made of wool, how strongly do you believe that they are:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

9 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Customers ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Farmers are expected to have a high level of knowledge of their wool	[ ]	[ ]	[ ]	[ ]	[ ]
Wool garments by brand are not well known by customer(s)	[ ]	[ ]	[ ]	[ ]	[ ]
It is easy to form a strong relationship with my retailer	[ ]	[ ]	[ ]	[ ]	[ ]
Selling garments made from high quality wool is a good growth opportunity for retailers	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool characteristics	[ ]	[ ]	[ ]	[ ]	[ ]
Customers are willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
The relationships with other people are all important to me	[ ]	[ ]	[ ]	[ ]	[ ]
Retailers must sell wool/wool garments that meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers of wool yarn/cloth/garments are expected to have high levels of technological knowledge	[ ]	[ ]	[ ]	[ ]	[ ]
People believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
It is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool types.	[ ]	[ ]	[ ]	[ ]	[ ]
Woollen garments are nicer to wear than synthetic garments	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are not made from woollen yarn	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are made from woollen cloth	[ ]	[ ]	[ ]	[ ]	[ ]

10 Which of the following are of importance to you when purchasing clothing made from wool?

	very important	important	neutral	unimportant	Very unimportant
Brand name	[ ]	[ ]	[ ]	[ ]	[ ]
Style of clothing	[ ]	[ ]	[ ]	[ ]	[ ]
Purpose for buying the clothing	[ ]	[ ]	[ ]	[ ]	[ ]
What it is made of	[ ]	[ ]	[ ]	[ ]	[ ]
How easy the care of the garment is	[ ]	[ ]	[ ]	[ ]	[ ]
Image of what people think of you	[ ]	[ ]	[ ]	[ ]	[ ]
The weather you are expecting	[ ]	[ ]	[ ]	[ ]	[ ]
Advertising	[ ]	[ ]	[ ]	[ ]	[ ]
The store you purchase the clothes in	[ ]	[ ]	[ ]	[ ]	[ ]
Being environmentally friendly	[ ]	[ ]	[ ]	[ ]	[ ]
How difficult it is to wash	[ ]	[ ]	[ ]	[ ]	[ ]
Price	[ ]	[ ]	[ ]	[ ]	[ ]
The reason for buying the clothes	[ ]	[ ]	[ ]	[ ]	[ ]
The colour of the garments	[ ]	[ ]	[ ]	[ ]	[ ]

11 In your opinion, if you were asked to describe the type of person who you thought would buy wool garments, would they be:

	strongly agree	agree	neutral	disagree	strongly disagree
An old person	[ ]	[ ]	[ ]	[ ]	[ ]
Outdoor person	[ ]	[ ]	[ ]	[ ]	[ ]
Fashion conscious	[ ]	[ ]	[ ]	[ ]	[ ]
Pessimistic	[ ]	[ ]	[ ]	[ ]	[ ]
Shy	[ ]	[ ]	[ ]	[ ]	[ ]

12 In your opinion is clothing made of wool:

	strongly agree	agree	neutral	disagree	strongly disagree
Unreasonably expensive	[ ]	[ ]	[ ]	[ ]	[ ]
Easy to obtain	[ ]	[ ]	[ ]	[ ]	[ ]
Long lasting	[ ]	[ ]	[ ]	[ ]	[ ]
Good value	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent quality in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
Snugly	[ ]	[ ]	[ ]	[ ]	[ ]

13 How strongly do you agree that when you hear the term naturally coloured wool you think of:

	strongly agree	agree	neutral	disagree	strongly disagree
A wonderful subtlety of colour	[ ]	[ ]	[ ]	[ ]	[ ]
A large number of colour shades	[ ]	[ ]	[ ]	[ ]	[ ]
High contrast between colours	[ ]	[ ]	[ ]	[ ]	[ ]
A limited range of basic colours	[ ]	[ ]	[ ]	[ ]	[ ]
The original colour of sheep	[ ]	[ ]	[ ]	[ ]	[ ]
A natural look about the product	[ ]	[ ]	[ ]	[ ]	[ ]
High potential of creativity	[ ]	[ ]	[ ]	[ ]	[ ]
No need to dye the wool	[ ]	[ ]	[ ]	[ ]	[ ]
Individual style for the wearer	[ ]	[ ]	[ ]	[ ]	[ ]
High rarity of product value	[ ]	[ ]	[ ]	[ ]	[ ]
A large amount of flecks of colour in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
A high level of impurities in the garment	[ ]	[ ]	[ ]	[ ]	[ ]

14 Which of the following do you believe to be a natural colour of a sheep?

beige [ ] grey [ ] white [ ] black [ ] brown [ ] green [ ] cream [ ] red [ ]

15 When you are deciding which retail outlets to shop in, how important is it to you that the shop is:

	very important	important	neutral	unimportant	very unimportant
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

16 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
I do not know any wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I am willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I think it is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I will not pay more for branded wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool/wool garments must meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]

Continued . . .

17 Briefly describe your belief of the characteristics of garments made from the following wools:

Black Welsh Mountain _____

Herdwick _____

Jacob _____

Lincoln Longwool _____

Merino _____

Pure New Wool _____

Shetland _____

Wensleydale _____

18 Have you seen a garment made from:

	yes	no
Black Welsh Mountain	[ ]	[ ]
Herdwick	[ ]	[ ]
Jacob	[ ]	[ ]
Lincoln Long Wool	[ ]	[ ]
Merino	[ ]	[ ]
Pure New Wool	[ ]	[ ]
Shetland	[ ]	[ ]
Wensleydale	[ ]	[ ]

If Yes for any of them - what did you think of the garment? _____

Personal details

19 Gender male [ ] female [ ]

20 Please specify your postcode [ ][ ][ ][ ] [ ][ ][ ][ ]

21 What is the occupation of your head of household? _____

22 Please state your age 11-20 [ ] 21-30 [ ] 31-40 [ ] 41-50 [ ] 51-60 [ ] 61 and over [ ]

23 Using the classifications below, approximately how much is the total joint income in your household?

less than £5,000 [ ] £5,000-£10,000 [ ] £10,001-£20,000 [ ]
£20,001-£30,000 [ ] £30,001-£50,000 [ ] over £50,000 [ ]

Thank you for completing the questionnaire

Retail Buyers Questionnaire

Mark boxes boldly with a pencil, like this [■] DO NOT tick, cross, or circle
DO NOT photocopy, fold, crease, punch holes or use staples

1 Which parties are involved in your company's purchasing within the supply chain?

Auction house	[ ]	Rack jobber	[ ]
Broker	[ ]	Raw resource producer (farmer)	[ ]
Commission agent	[ ]	Showroom sales agent	[ ]
Co-operative group	[ ]	Speciality line merchandiser	[ ]
Designer	[ ]	Wholesaler	[ ]
Drop shipper	[ ]	Wool board	[ ]
Fashion house	[ ]	Other (please state)	[ ]
Manufacturer agent	[ ]	_____	

Reference No.

0 [ ] 0 [ ] 0 [ ]
1 [ ] 1 [ ] 1 [ ]
2 [ ] 2 [ ] 2 [ ]
3 [ ] 3 [ ] 3 [ ]
4 [ ] 4 [ ] 4 [ ]
5 [ ] 5 [ ] 5 [ ]
6 [ ] 6 [ ] 6 [ ]
7 [ ] 7 [ ] 7 [ ]
8 [ ] 8 [ ] 8 [ ]
9 [ ] 9 [ ] 9 [ ]

2 How many people are involved in the purchasing decision within your company?

1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 or more [ ]

3 Does your company have a central buying office for cloth and garments? yes [ ] no [ ]

4 Does your company have a mission statement? (If yes, can you please send a copy) yes [ ] no [ ]

5 How often does your company change suppliers?

never [ ] every year [ ] 2 years [ ] 3 years [ ] 4 years [ ] 5 years [ ] over 5 yrs [ ]

6 How important do you feel the following criteria are for selecting your suppliers?

	very important	important	neutral	unimportant	very unimportant
Proven supply record	[ ]	[ ]	[ ]	[ ]	[ ]
Transit & arrival time from your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Shipment delays	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your customers	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Paperwork errors	[ ]	[ ]	[ ]	[ ]	[ ]
Customer complaints	[ ]	[ ]	[ ]	[ ]	[ ]
Your supplier can refill orders	[ ]	[ ]	[ ]	[ ]	[ ]
Your mark-up is adequate	[ ]	[ ]	[ ]	[ ]	[ ]
Demand of specific fleece/wool types by customers	[ ]	[ ]	[ ]	[ ]	[ ]
Quantity of fibre available for purchase	[ ]	[ ]	[ ]	[ ]	[ ]
Customers ask for product/line	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier knowledge of YOUR needs	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers line is cut to fit customers	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier advertises line	[ ]	[ ]	[ ]	[ ]	[ ]
Quality of finished garments	[ ]	[ ]	[ ]	[ ]	[ ]
Good discounts	[ ]	[ ]	[ ]	[ ]	[ ]
High supplier company profile	[ ]	[ ]	[ ]	[ ]	[ ]
Returned goods are dealt with efficiently	[ ]	[ ]	[ ]	[ ]	[ ]
Warehouse handling	[ ]	[ ]	[ ]	[ ]	[ ]

Retail Buyers Questionnaire

7 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Overall, I am completely unsatisfied with my company's relationship with our suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Based on my experience with our suppliers I would recommend them to others	[ ]	[ ]	[ ]	[ ]	[ ]

8 Briefly describe who you believe your main wool clothing target customer to be

Age range	11-20 [ ]	21-30 [ ]	31-40 [ ]	41-50 [ ]	51-60 [ ]	61 and over [ ]
Socio-economic group	A [ ]	B [ ]	C1 [ ]	C2 [ ]	D [ ]	E [ ]

9 Does your company sell garments made from:

	yes	no	
100% wool	[ ]	[ ]	
wool mixes	[ ]	[ ]	**(If no, please go to question 15)**

10 Approximately what percentage of your total items sold is made from 100% wool and wool mixes?

1-10% [ ] 11-20% [ ] 21-50% [ ] 51-75% [ ] 76-100% [ ]

11 When you select wool cloth and garments for purchase, from the many wool types and brands available on the market, would you say that:

	strongly agree	agree	neutral	disagree	strongly disagree
I would care a great deal as to which one I would buy	[ ]	[ ]	[ ]	[ ]	[ ]

12 Do you believe that the various wool types and brands available in the market, are:

	strongly agree	agree	neutral	disagree	strongly disagree
All very alike	[ ]	[ ]	[ ]	[ ]	[ ]

13 How important is it for you, to make a right choice when purchasing wool cloth and garments?

	strongly agree	agree	neutral	disagree	strongly disagree
Extremely important	[ ]	[ ]	[ ]	[ ]	[ ]

14 When you make your selection of wool cloth and garments, how concerned are you about the outcome of your choice?

	strongly agree	agree	neutral	disagree	strongly disagree
Very much concerned	[ ]	[ ]	[ ]	[ ]	[ ]

15 How strongly do you believe that the following groups of people have similar beliefs to you, that the types and breeds of sheep's wool are very similar?

	strongly agree	agree	neutral	disagree	strongly disagree
Sheep farmers	[ ]	[ ]	[ ]	[ ]	[ ]
British Wool Marketing Board	[ ]	[ ]	[ ]	[ ]	[ ]
Wool brokers	[ ]	[ ]	[ ]	[ ]	[ ]
Manufacturer agents	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes manufacturer	[ ]	[ ]	[ ]	[ ]	[ ]
Other clothes retailers	[ ]	[ ]	[ ]	[ ]	[ ]
Weaving mills	[ ]	[ ]	[ ]	[ ]	[ ]
Spinning mills	[ ]	[ ]	[ ]	[ ]	[ ]
People who wear wool clothing	[ ]	[ ]	[ ]	[ ]	[ ]

16 When you consider retail outlets, that sell garments made of wool, how strongly do you believe that they are?

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

17 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Customers ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Farmers are expected to have a high level of knowledge of their wool	[ ]	[ ]	[ ]	[ ]	[ ]
Wool garments by brand are not well known by customer(s)	[ ]	[ ]	[ ]	[ ]	[ ]
It is easy to form a strong relationship with my supplier	[ ]	[ ]	[ ]	[ ]	[ ]
Selling garments made from high quality wool is a good growth opportunity for me	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool characteristics	[ ]	[ ]	[ ]	[ ]	[ ]
Customers are willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Relationships with other retailers are all important to me	[ ]	[ ]	[ ]	[ ]	[ ]
I must sell wool/wool garments that meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers of wool/yarn/cloth/garments are expected to have high levels of technological knowledge	[ ]	[ ]	[ ]	[ ]	[ ]
People believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
It is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool types	[ ]	[ ]	[ ]	[ ]	[ ]
Woollen garments are nicer to wear than synthetic garments	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are not made from woollen yarn	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are made from woollen cloth	[ ]	[ ]	[ ]	[ ]	[ ]

18 If you were asked to describe the type of person who you thought would buy wool garments, would they be:

	strongly agree	agree	neutral	disagree	strongly disagree
An old person	[ ]	[ ]	[ ]	[ ]	[ ]
Outdoor person	[ ]	[ ]	[ ]	[ ]	[ ]
Fashion conscious	[ ]	[ ]	[ ]	[ ]	[ ]
Pessimistic	[ ]	[ ]	[ ]	[ ]	[ ]
Shy	[ ]	[ ]	[ ]	[ ]	[ ]

19 From the following list, which expresses your opinion of clothing made of wool?

	strongly agree	agree	neutral	disagree	strongly disagree
Unreasonably expensive	[ ]	[ ]	[ ]	[ ]	[ ]
Easy to obtain	[ ]	[ ]	[ ]	[ ]	[ ]
Long lasting	[ ]	[ ]	[ ]	[ ]	[ ]
Good value	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent quality	[ ]	[ ]	[ ]	[ ]	[ ]
Comforting	[ ]	[ ]	[ ]	[ ]	[ ]
Snugly	[ ]	[ ]	[ ]	[ ]	[ ]

20 Please mark the appropriate box that expresses your opinion more closely to the following statement: When I hear the term naturally coloured wool I think of :

	strongly agree	agree	neutral	disagree	strongly disagree
A wonderful subtlety of colour	[ ]	[ ]	[ ]	[ ]	[ ]
A large number of colour shades	[ ]	[ ]	[ ]	[ ]	[ ]
High contrast between colours	[ ]	[ ]	[ ]	[ ]	[ ]
A limited range of basic colours	[ ]	[ ]	[ ]	[ ]	[ ]
The original colour of sheep	[ ]	[ ]	[ ]	[ ]	[ ]
A natural look about the product	[ ]	[ ]	[ ]	[ ]	[ ]
High potential of creativity	[ ]	[ ]	[ ]	[ ]	[ ]
No need to dye the wool	[ ]	[ ]	[ ]	[ ]	[ ]
Individual style for the wearer	[ ]	[ ]	[ ]	[ ]	[ ]
High rarity of product value	[ ]	[ ]	[ ]	[ ]	[ ]
A large amount of flecks of colour in garment	[ ]	[ ]	[ ]	[ ]	[ ]
A high level of impurities in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent colour	[ ]	[ ]	[ ]	[ ]	[ ]

21 Which of the following do you believe to be a natural colour of a sheep?

beige [ ] grey [ ] white [ ] black [ ] brown [ ] green [ ] cream [ ] red [ ]

22 When you are deciding which retail outlets to shop in, how important is it to you that the shop is:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

23 When you are purchasing wool garments, how strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
I do not know any wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I am willing to pay more for branded wool/wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I think it is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I will not pay more for branded wool garments for myself	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool/wool garments must meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]

24 Briefly describe your belief of the characteristics of garments made from the following wools:

Black Welsh Mountain

Herdwick

Jacob

Lincoln Longwool

Merino

Pure New Wool

Shetland

Wensleydale

25 Have you seen a garment made from:

	yes	no
Black Welsh Mountain	[ ]	[ ]
Herdwick	[ ]	[ ]
Jacob	[ ]	[ ]
Lincoln Longwool	[ ]	[ ]
Merino	[ ]	[ ]
Pure New Wool	[ ]	[ ]
Shetland	[ ]	[ ]
Wensleydale	[ ]	[ ]

(If YES for any of them) What did you think of the garment?

Manufacturer Buyers Questionnaire

Mark boxes boldly with a pencil, like this [■] DO NOT tick, cross, or circle
DO NOT photocopy, fold, crease, punch holes or use staples

1 Which parties are involved in your company's purchasing within the supply chain?

Auction house	[ ]	Rack jobber	[ ]
Broker	[ ]	Raw resource producer (farmer)	[ ]
Commission agent	[ ]	Showroom sales agent	[ ]
Co-operative group	[ ]	Speciality line merchandiser	[ ]
Designer	[ ]	Wholesaler	[ ]
Drop shipper	[ ]	Wool board	[ ]
Fashion house	[ ]	Other (please state)	[ ]
Manufacturer agent	[ ]	_____	

Reference No.

0 [ ] 0 [ ] 0 [ ]
1 [ ] 1 [ ] 1 [ ]
2 [ ] 2 [ ] 2 [ ]
3 [ ] 3 [ ] 3 [ ]
4 [ ] 4 [ ] 4 [ ]
5 [ ] 5 [ ] 5 [ ]
6 [ ] 6 [ ] 6 [ ]
7 [ ] 7 [ ] 7 [ ]
8 [ ] 8 [ ] 8 [ ]
9 [ ] 9 [ ] 9 [ ]

2 How many people are involved in the purchasing decision within your company?

1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 or more [ ]

3 Does your company have a central buying office for cloth? yes [ ] no [ ]

4 Does your company have a mission statement? (If yes, can you please send a copy) yes [ ] no [ ]

5 How often does your company change suppliers?

never [ ] every year [ ] 2 years [ ] 3 years [ ] 4 years [ ] 5 years [ ] over 5 yrs [ ]

6 How important do you feel the following criteria are for selecting your suppliers?

	very important	important	neutral	unimportant	very unimportant
Proven supply record	[ ]	[ ]	[ ]	[ ]	[ ]
Transit & arrival time from your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Shipment delays	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your customers	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Paperwork errors	[ ]	[ ]	[ ]	[ ]	[ ]
Customer complaints	[ ]	[ ]	[ ]	[ ]	[ ]
Your supplier can refill orders	[ ]	[ ]	[ ]	[ ]	[ ]
Your mark-up is adequate	[ ]	[ ]	[ ]	[ ]	[ ]
Demand of specific fleece/wool types by customers	[ ]	[ ]	[ ]	[ ]	[ ]
Quantity of fibre available for purchase	[ ]	[ ]	[ ]	[ ]	[ ]
Customers ask for product/line	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier knowledge of YOUR needs	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers line is cut to fit customers	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier advertises line	[ ]	[ ]	[ ]	[ ]	[ ]
Quality of finished garments	[ ]	[ ]	[ ]	[ ]	[ ]
Good discounts	[ ]	[ ]	[ ]	[ ]	[ ]
High supplier company profile	[ ]	[ ]	[ ]	[ ]	[ ]
Returned goods are dealt with efficiently	[ ]	[ ]	[ ]	[ ]	[ ]
Warehouse handling	[ ]	[ ]	[ ]	[ ]	[ ]

Manufacturer Buyers Questionnaire

7 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Overall, I am completely unsatisfied with my company's relationship with our suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Based on my experience with our suppliers I would recommend them to others	[ ]	[ ]	[ ]	[ ]	[ ]

8 Briefly describe who you believe your main wool clothing target customer to be:

Age range	11-20 [ ]	21-30 [ ]	31-40 [ ]	41-50 [ ]	51-60 [ ]	61 and over [ ]
Socio-economic group	A [ ]	B [ ]	C1 [ ]	C2 [ ]	D [ ]	E [ ]

9 Does your company sell garments made from:

	yes	no	
100% wool	[ ]	[ ]	
wool mixes	[ ]	[ ]	**(If no, please go to question 15)**

10 Approximately what percentage of your total items sold is made from 100% wool and wool mixes?

1-10% [ ] 11-20% [ ] 21-50% [ ] 51-75% [ ] 76-100% [ ]

11 When you select wool cloth and garments for purchase, from the many wool types and brands available on the market, would you say that:

	strongly agree	agree	neutral	disagree	strongly disagree
I would care a great deal as to which one I would buy	[ ]	[ ]	[ ]	[ ]	[ ]

12 Do you believe that the various wool types and brands available in the market, are:

	strongly agree	agree	neutral	disagree	strongly disagree
All very alike	[ ]	[ ]	[ ]	[ ].	[ ]

13 How important is it for you, to make a right choice when purchasing wool cloth and garments?

	strongly agree	agree	neutral	disagree	strongly disagree
Extremely important	[ ]	[ ]	[ ]	[ ]	[ ]

14 When you make your selection of wool cloth and garments, how concerned are you about the outcome of your choice?

	strongly agree	agree	neutral	disagree	strongly disagree
Very much concerned	[ ]	[ ]	[ ]	[ ]	[ ]

15 How strongly do you believe that the following groups of people view the various types and breeds of sheep's wool as very similar?

	strongly agree	agree	neutral	disagree	strongly disagree
Sheep farmers	[ ]	[ ]	[ ]	[ ]	[ ]
British Wool Marketing Board	[ ]	[ ]	[ ]	[ ]	[ ]
Wool brokers	[ ]	[ ]	[ ]	[ ]	[ ]
Manufacturer agents	[ ]	[ ]	[ ]	[ ]	[ ]
Other clothes manufacturers	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes retailers	[ ]	[ ]	[ ]	[ ]	[ ]
Weaving mills	[ ]	[ ]	[ ]	[ ]	[ ]
Spinning mills	[ ]	[ ]	[ ]	[ ]	[ ]
People who wear wool clothing	[ ]	[ ]	[ ]	[ ]	[ ]

16 When you consider retail outlets, that sell garments made of wool, how strongly do you believe that they are?

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

22 When you are deciding which retail outlets to shop in, how important is it to you that the shop is:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

23 When you are purchasing wool garments for yourself, how strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
I do not know any wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I am willing to pay more for branded wool/wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I think it is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I will not pay more for branded wool garments for myself	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool/wool garments must meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]

24 Briefly describe your belief of the characteristics of garments made from the following wools:

Black Welsh Mountain

Herdwick

Jacob

Lincoln Longwool

Merino

Pure New Wool

Shetland

Wensleydale

25 Have you seen a garment made from:

	yes	no
Black Welsh Mountain	[ ]	[ ]
Herdwick	[ ]	[ ]
Jacob	[ ]	[ ]
Lincoln Longwool	[ ]	[ ]
Merino	[ ]	[ ]
Pure New Wool	[ ]	[ ]
Shetland	[ ]	[ ]
Wensleydale	[ ]	[ ]

(If YES for any of them) What did you think of the garment?

Thank you for completing the questionnaire
Please return in the SAE enclosed

Wool Processor Questionnaire

Mark boxes boldly with a pencil, like this [■] DO NOT tick, cross, or circle
DO NOT photocopy, fold, crease, punch holes or use staples

Reference No.

0 [ ]	0 [ ]	0 [ ]
1 [ ]	1 [ ]	1 [ ]
2 [ ]	2 [ ]	2 [ ]
3 [ ]	3 [ ]	3 [ ]
4 [ ]	4 [ ]	4 [ ]
5 [ ]	5 [ ]	5 [ ]
6 [ ]	6 [ ]	6 [ ]
7 [ ]	7 [ ]	7 [ ]
8 [ ]	8 [ ]	8 [ ]
9 [ ]	9 [ ]	9 [ ]

1 How many people are involved in the purchasing decision for fleece/wool within your company?

1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 or more [ ]

2 Does your company have a mission statement? (If Yes, can you please send a copy of the mission statement) yes [ ] no [ ]

3 From which of the following do you purchase your fleece/wool?

British Wool Marketing Board [ ] Wool Processors [ ] Foreign Importers [ ] Direct from the farm [ ]

Other (Please specify) [ ] _____

4 How often do you change suppliers?

never [ ] every year [ ] 2 years [ ] 3 years [ ] 4 years [ ] 5 years [ ] over 5 yrs [ ]

5 How important do you feel the following criteria are when selecting your suppliers for fleece/wool/yarn?

	very important	important	neutral	unimportant	very unimportant
Proven supply record	[ ]	[ ]	[ ]	[ ]	[ ]
Transit & arrival time from your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Shipment delays	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your customers	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Paperwork errors	[ ]	[ ]	[ ]	[ ]	[ ]
Customer complaints	[ ]	[ ]	[ ]	[ ]	[ ]
Your supplier can refill orders	[ ]	[ ]	[ ]	[ ]	[ ]
Your mark-up is adequate	[ ]	[ ]	[ ]	[ ]	[ ]
Demand of specific fleece/wool types by customer	[ ]	[ ]	[ ]	[ ]	[ ]
Quantity of fibre available for purchase	[ ]	[ ]	[ ]	[ ]	[ ]
Customers ask for product/line	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier knowledge of YOUR needs	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier advertises line	[ ]	[ ]	[ ]	[ ]	[ ]
Quality of finished garments	[ ]	[ ]	[ ]	[ ]	[ ]
Warehouse handling	[ ]	[ ]	[ ]	[ ]	[ ]
Good discounts	[ ]	[ ]	[ ]	[ ]	[ ]
High supplier company profile	[ ]	[ ]	[ ]	[ ]	[ ]
Returned goods are dealt with efficiently	[ ]	[ ]	[ ]	[ ]	[ ]
Consistency of colour	[ ]	[ ]	[ ]	[ ]	[ ]
Fineness of fibre	[ ]	[ ]	[ ]	[ ]	[ ]
Contamination of fibre	[ ]	[ ]	[ ]	[ ]	[ ]

6 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Overall, I am completely satisfied with company's relationship with our suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Based on my experience with our suppliers I would recommend them to others	[ ]	[ ]	[ ]	[ ]	[ ]

7 Approximately what percentage of your total items sold are made from wool and wool mixes?

1-10% [ ] 11-20% [ ] 21-50% [ ] 51-75% [ ] 76-100% [ ] 100% [ ]

Wool Processor Questionnaire

8 When you select wool fibre and wool yarn for purchase, from the many wool types available in the market, would you say that:

	strongly agree	agree	neutral	disagree	strongly disagree
I would care a great deal as to which one I buy	[ ]	[ ]	[ ]	[ ]	[ ]

9 Do you believe that the various wool types, available in the market, are:

	strongly agree	agree	neutral	disagree	strongly disagree
All very alike	[ ]	[ ]	[ ]	[ ]	[ ]

10 How important, is it for you, to make a right choice when purchasing wool fibre and yarn?

	strongly agree	agree	neutral	disagree	strongly disagree
Extremely important	[ ]	[ ]	[ ]	[ ]	[ ]

11 When you make your selection of wool fibre and wool and wool yarn, how concerned are you about the outcome of your choice?

	strongly agree	agree	neutral	disagree	strongly disagree
Very much concerned	[ ]	[ ]	[ ]	[ ]	[ ]

12 How strongly do you believe that the following groups of people view the various types and breeds of sheep's wool as very similar?

	strongly agree	agree	neutral	disagree	strongly disagree
Farmers	[ ]	[ ]	[ ]	[ ]	[ ]
British Wool Marketing Board	[ ]	[ ]	[ ]	[ ]	[ ]
Wool brokers	[ ]	[ ]	[ ]	[ ]	[ ]
Manufacturer agents	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes manufacturer	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes retailers	[ ]	[ ]	[ ]	[ ]	[ ]
Other weaving mills	[ ]	[ ]	[ ]	[ ]	[ ]
Other spinning mills	[ ]	[ ]	[ ]	[ ]	[ ]
People who wear wool clothing	[ ]	[ ]	[ ]	[ ]	[ ]

13 When you consider retail outlets, that sell garments made of wool, how strongly do you believe that they are:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

14 How strongly do you agree with these statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Customers ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Farmers are expected to have a high level of knowledge of their wool	[ ]	[ ]	[ ]	[ ]	[ ]
Wool garments by brand are not well known by customer(s)	[ ]	[ ]	[ ]	[ ]	[ ]
It is easy to form a strong relationship with my supplier	[ ]	[ ]	[ ]	[ ]	[ ]
Selling garments made from high quality wool is a good growth opportunity for me	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool characteristics	[ ]	[ ]	[ ]	[ ]	[ ]
Customers are willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Relationships with other wool processors are all important to me	[ ]	[ ]	[ ]	[ ]	[ ]
I must sell wool/wool garments that meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers of wool yarn/cloth/garments are expected to have high levels of technological knowledge	[ ]	[ ]	[ ]	[ ]	[ ]
People believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
It is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool types	[ ]	[ ]	[ ]	[ ]	[ ]
Woollen garments are nicer to wear than synthetic garments	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are not made from woollen yarn	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are made from woollen cloth	[ ]	[ ]	[ ]	[ ]	[ ]

15 If you were asked to describe the type of person who you thought would buy wool garments, would they be:

	strongly agree	agree	neutral	disagree	strongly disagree
An old person	[ ]	[ ]	[ ]	[ ]	[ ]
Outdoor person	[ ]	[ ]	[ ]	[ ]	[ ]
Fashion conscious	[ ]	[ ]	[ ]	[ ]	[ ]
Pessimistic	[ ]	[ ]	[ ]	[ ]	[ ]
Shy	[ ]	[ ]	[ ]	[ ]	[ ]

16 From the following list, which expresses your opinion of clothing made of wool?

	strongly agree	agree	neutral	disagree	strongly disagree
Unreasonably expensive	[ ]	[ ]	[ ]	[ ]	[ ]
Easy to obtain	[ ]	[ ]	[ ]	[ ]	[ ]
Long lasting	[ ]	[ ]	[ ]	[ ]	[ ]
Good value	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent quality	[ ]	[ ]	[ ]	[ ]	[ ]
Comforting	[ ]	[ ]	[ ]	[ ]	[ ]
Snugly	[ ]	[ ]	[ ]	[ ]	[ ]

17 From the following list, which expresses your opinion more closely to the following statement: When I hear the term naturally coloured wool I think of:

	strongly agree	agree	neutral	disagree	strongly disagree
A wonderful subtle colour	[ ]	[ ]	[ ]	[ ]	[ ]
A large number of colour shades	[ ]	[ ]	[ ]	[ ]	[ ]
High contrast between colours	[ ]	[ ]	[ ]	[ ]	[ ]
A limited range of basic colours	[ ]	[ ]	[ ]	[ ]	[ ]
The original colour of sheep	[ ]	[ ]	[ ]	[ ]	[ ]
A natural look about the product	[ ]	[ ]	[ ]	[ ]	[ ]
High potential of creativity	[ ]	[ ]	[ ]	[ ]	[ ]
No need to dye the wool	[ ]	[ ]	[ ]	[ ]	[ ]
Individual style for the wearer	[ ]	[ ]	[ ]	[ ]	[ ]
High rarity of product	[ ]	[ ]	[ ]	[ ]	[ ]
A large amount of flecks of colour in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
A high amount of impurities in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent colour	[ ]	[ ]	[ ]	[ ]	[ ]

18 Which of the following do you believe to be a natural colour of a sheep?

beige [ ] grey [ ] white [ ] black [ ] brown [ ] green [ ] cream [ ] red [ ]

19 When you are deciding which retail outlets to shop in, how important is it to you that the shop is:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

20 When you are purchasing wool garments for yourself, how strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
I do not know any wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I am willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I think it is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool/wool garments must meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]

21 Briefly describe your belief of the characteristics of garments made from the following wools:

Black Welsh Mountain

Herdwick

Jacob

Lincoln Longwool

Merino

Pure New Wool

Shetland

Wensleydale

22 Have you seen a garment made from:

	yes	no
Black Welsh Mountain	[ ]	[ ]
Herdwick	[ ]	[ ]
Jacob	[ ]	[ ]
Lincoln Longwool	[ ]	[ ]
Merino	[ ]	[ ]
Pure New Wool	[ ]	[ ]
Shetland	[ ]	[ ]
Wensleydale	[ ]	[ ]

(If YES for any of them) What did you think of the garment?

Thank you for completing the questionnaire
Please return in the SAE enclosed

Wool Buyers Questionnaire

Mark boxes boldly with a pencil, like this [■] DO NOT tick, cross or circle

DO NOT photocopy, fold, crease, punch holes or use staples

Reference no.

0 [ ] 0 [ ] 0 [ ]
1 [ ] 1 [ ] 1 [ ]
2 [ ] 2 [ ] 2 [ ]
3 [ ] 3 [ ] 3 [ ]
4 [ ] 4 [ ] 4 [ ]
5 [ ] 5 [ ] 5 [ ]
6 [ ] 6 [ ] 6 [ ]
7 [ ] 7 [ ] 7 [ ]
8 [ ] 8 [ ] 8 [ ]
9 [ ] 9 [ ] 9 [ ]

1 How many people are involved in the purchasing decision within your company?

1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 or more [ ]

2 Does you company have a mission statement? yes [ ] no [ ]

(If Yes, can you please send a copy of the mission statement)

3 Who would you describe your typical customer to be?

British Wool Marketing Board [ ] Foreign wool processors [ ] Hand spinners [ ] UK wool processors [ ] Other (please specify) [ ]

_____

4 How often do you change suppliers?

never [ ] every year [ ] 2 years [ ] 3 years [ ] 4 years [ ] 5 years [ ] over 5 years [ ]

5 How important do you feel the following criteria are for selecting your suppliers?

	very Important	Important	neutral	unimportant	very unimportant
Proven supply record	[ ]	[ ]	[ ]	[ ]	[ ]
Transit & arrival time from your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Shipment delays	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your customers	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Paperwork errors	[ ]	[ ]	[ ]	[ ]	[ ]
Customer complaints	[ ]	[ ]	[ ]	[ ]	[ ]
Your supplier can refill orders	[ ]	[ ]	[ ]	[ ]	[ ]
Your mark-up is adequate	[ ]	[ ]	[ ]	[ ]	[ ]
Demand of specific fleece/wool types by customer	[ ]	[ ]	[ ]	[ ]	[ ]
Quantity of fibre available for purchase	[ ]	[ ]	[ ]	[ ]	[ ]
Customers ask for product/line	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier knowledge of YOUR needs	[ ]	[ ]	[ ]	[ ]	[ ]
Fineness of fibre	[ ]	[ ]	[ ]	[ ]	[ ]
Contamination of fibre	[ ]	[ ]	[ ]	[ ]	[ ]
Consistency of colour	[ ]	[ ]	[ ]	[ ]	[ ]
Warehouse handling	[ ]	[ ]	[ ]	[ ]	[ ]

6 When you select fleece for purchase, from the many fleece types available in the market, would you say that:

	strongly agree	agree	neutral	disagree	strongly disagree
I would care a great deal as to which one I buy	[ ]	[ ]	[ ]	[ ]	[ ]

7 Do you believe that the various fleece types, available in the market, are:

	strongly agree	agree	neutral	disagree	strongly disagree
All very alike	[ ]	[ ]	[ ]	[ ]	[ ]

8 How important is it for you to make a right choice when purchasing fleece?

	strongly agree	agree	neutral	disagree	strongly disagree
Extremely important	[ ]	[ ]	[ ]	[ ]	[ ]

9 When you make your selection of fleece, how concerned are you about the outcome of your choice?

	strongly agree	agree	neutral	disagree	strongly disagree
Very much concerned	[ ]	[ ]	[ ]	[ ]	[ ]

10 How strongly do you believe that the following groups of people have similar beliefs to you, in relation to the types and breeds of sheeps wool?

	strongly agree	agree	neutral	disagree	strongly disagree
Sheep farmers	[ ]	[ ]	[ ]	[ ]	[ ]
British Wool Marketing Board	[ ]	[ ]	[ ]	[ ]	[ ]
Wool brokers	[ ]	[ ]	[ ]	[ ]	[ ]
Manufacturer agents	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes manufacturers	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes retailers	[ ]	[ ]	[ ]	[ ]	[ ]
Weaving mills	[ ]	[ ]	[ ]	[ ]	[ ]
Spinning mills	[ ]	[ ]	[ ]	[ ]	[ ]
People who wear wool clothing	[ ]	[ ]	[ ]	[ ]	[ ]

11 When you consider retail outlets, that sell garments made of wool, how strongly do you believe that they are?

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

12 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Customers ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Farmers are expected to have a high level of knowledge of their wool	[ ]	[ ]	[ ]	[ ]	[ ]
Wool garments by brand are not well known by customer(s)	[ ]	[ ]	[ ]	[ ]	[ ]
It is easy to form a strong relationship with my supplier	[ ]	[ ]	[ ]	[ ]	[ ]
Selling high quality wool is a good growth opportunity for me	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool characteristics	[ ]	[ ]	[ ]	[ ]	[ ]
Customers are willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Relationships with other wool brokers are all important to me	[ ]	[ ]	[ ]	[ ]	[ ]
I must sell wool/wool garments that meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers of wool yarn/cloth/garments are expected to have high levels of technological knowledge	[ ]	[ ]	[ ]	[ ]	[ ]
People believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
It is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool types	[ ]	[ ]	[ ]	[ ]	[ ]
Woollen garments are nicer to wear than synthetic garments	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are not made from woollen yarn	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are made from woollen cloth	[ ]	[ ]	[ ]	[ ]	[ ]

13 If you were asked to describe the type of person who you thought would buy wool garments, would they be:

	strongly agree	agree	neutral	disagree	strongly disagree
An old person	[ ]	[ ]	[ ]	[ ]	[ ]
Outdoor person	[ ]	[ ]	[ ]	[ ]	[ ]
Fashion conscious	[ ]	[ ]	[ ]	[ ]	[ ]
Pessimistic	[ ]	[ ]	[ ]	[ ]	[ ]
Shy	[ ]	[ ]	[ ]	[ ]	[ ]

14 From the following list, which best expresses your opinion of clothing made of wool?

	strongly agree	agree	neutral	disagree	strongly disagree
Unreasonably expensive	[ ]	[ ]	[ ]	[ ]	[ ]
Easy to obtain	[ ]	[ ]	[ ]	[ ]	[ ]
Long lasting	[ ]	[ ]	[ ]	[ ]	[ ]
Good value	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent quality	[ ]	[ ]	[ ]	[ ]	[ ]
Comforting	[ ]	[ ]	[ ]	[ ]	[ ]
Snugly	[ ]	[ ]	[ ]	[ ]	[ ]

15 From the following list, which expresses your opinion more closely to the following statement:

When I hear the term naturally coloured wool I think of :

	strongly agree	agree	neutral	disagree	strongly disagree
A wonderful subtlety of colour	[ ]	[ ]	[ ]	[ ]	[ ]
A large number of colour shades	[ ]	[ ]	[ ]	[ ]	[ ]
High contrast between colours	[ ]	[ ]	[ ]	[ ]	[ ]
A limited range of basic colours	[ ]	[ ]	[ ]	[ ]	[ ]
The original colour of sheep	[ ]	[ ]	[ ]	[ ]	[ ]
A natural look about the product	[ ]	[ ]	[ ]	[ ]	[ ]
High potential of creativity	[ ]	[ ]	[ ]	[ ]	[ ]
No need to dye the wool	[ ]	[ ]	[ ]	[ ]	[ ]
Individual style for the wearer	[ ]	[ ]	[ ]	[ ]	[ ]
High rarity of product value	[ ]	[ ]	[ ]	[ ]	[ ]
A large amount of flecks of colour in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
A high level of impurities in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent colour	[ ]	[ ]	[ ]	[ ]	[ ]

16 Which of the following do you believe to be a natural colour of a sheep?

beige [ ] grey [ ] white [ ] black [ ] brown [ ] green [ ] cream [ ] red [ ]

17 When you are deciding which retail outlets to shop in, how important is it to you that the shop is:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

18 When you are purchasing wool garments, how strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
I do not know any wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I am willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I think it is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I will not pay more for branded wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool/wool garments must meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]

Continued . . .

19 Briefly describe your belief of the characteristics of garments made from the following wools:

Black Welsh Mountain _____

Herdwick _____

Jacob _____

Lincoln Longwool _____

Merino _____

Pure New Wool _____

Shetland _____

Wensleydale _____

20 Have you seen a garment made from:

	yes	no
Black Welsh Mountain	[ ]	[ ]
Herdwick	[ ]	[ ]
Jacob	[ ]	[ ]
Lincoln Longwool	[ ]	[ ]
Merino	[ ]	[ ]
Pure New Wool	[ ]	[ ]
Shetland	[ ]	[ ]
Wensleydale	[ ]	[ ]

If YES for any of them, what did you think of the garment? _____

Thank you for completing the questionnaire

Sheep Farmer Questionnaire

Mark boxes boldly with a pencil, like this ■ DO NOT tick, cross or circle
DO NOT photocopy, fold, crease, punch holes or use staples

Reference no.

0 [ ] 0 [ ] 0 [ ]
1 [ ] 1 [ ] 1 [ ]
2 [ ] 2 [ ] 2 [ ]
3 [ ] 3 [ ] 3 [ ]
4 [ ] 4 [ ] 4 [ ]
5 [ ] 5 [ ] 5 [ ]
6 [ ] 6 [ ] 6 [ ]
7 [ ] 7 [ ] 7 [ ]
8 [ ] 8 [ ] 8 [ ]
9 [ ] 9 [ ] 9 [ ]

1 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I keep sheep mainly for their wool	[ ]	[ ]	[ ]	[ ]	[ ]
Sheep are the only profitable use for my land	[ ]	[ ]	[ ]	[ ]	[ ]
Sheep are the most profitable livestock for me	[ ]	[ ]	[ ]	[ ]	[ ]
I keep sheep mainly for their carcass price	[ ]	[ ]	[ ]	[ ]	[ ]
I keep sheep because of the EU subsidies	[ ]	[ ]	[ ]	[ ]	[ ]

2 How many sheep do you own?

	less than 50	51-100	101-200	201-300	301-400	401-500	more than 500
Breeding ewes	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Ewes	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Shearlings	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Lambs under 1 year	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Rams	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Whethers	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

3 Please state sheep breed kept and mark % of flock size.

	1-10%	11-20%	21-30%	31-50%	51-60%	61-70%	71-80%	81-90%	91-100%
_____	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
_____	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
_____	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
_____	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
_____	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

4 When you think of yourself, which of the following do you believe best describes you?

	strongly agree	agree	neutral	disagree	strongly disagree
An old person	[ ]	[ ]	[ ]	[ ]	[ ]
An outdoor person	[ ]	[ ]	[ ]	[ ]	[ ]
Fashion conscious	[ ]	[ ]	[ ]	[ ]	[ ]
Pessimistic	[ ]	[ ]	[ ]	[ ]	[ ]
Shy	[ ]	[ ]	[ ]	[ ]	[ ]

5 How important do you feel the following criteria are when buying sheep?

	very important	important	neutral	unimportant	very important
Proven supply record	[ ]	[ ]	[ ]	[ ]	[ ]
Transit & arrival time from your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Shipment delays	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your customers	[ ]	[ ]	[ ]	[ ]	[ ]
Long standing working relationships with your suppliers	[ ]	[ ]	[ ]	[ ]	[ ]
Paperwork errors	[ ]	[ ]	[ ]	[ ]	[ ]
Customer complaints	[ ]	[ ]	[ ]	[ ]	[ ]
Your supplier can refill orders	[ ]	[ ]	[ ]	[ ]	[ ]
Your mark-up is adequate	[ ]	[ ]	[ ]	[ ]	[ ]
Demand of specific fleece/wool types by customers	[ ]	[ ]	[ ]	[ ]	[ ]
Quantity of sheep/fibre available for purchase	[ ]	[ ]	[ ]	[ ]	[ ]
Supplier knowledge of YOUR needs	[ ]	[ ]	[ ]	[ ]	[ ]
Fineness of fibre	[ ]	[ ]	[ ]	[ ]	[ ]
Contamination of fibre	[ ]	[ ]	[ ]	[ ]	[ ]
Consistency of colour	[ ]	[ ]	[ ]	[ ]	[ ]
History of the animals breeding line	[ ]	[ ]	[ ]	[ ]	[ ]
Overall health of the animal	[ ]	[ ]	[ ]	[ ]	[ ]

6 When you select rams and ewes for purchase, from the many sheep breeds available in the market, would you say that:

	strongly agree	agree	neutral	disagree	strongly disagree
I would care a great deal as to which breed I buy	[ ]	[ ]	[ ]	[ ]	[ ]

7 Do you believe that the various wool types and sheep available in the market are:

	strongly agree	agree	neutral	disagree	strongly disagree
All very alike	[ ]	[ ]	[ ]	[ ]	[ ]

8 How important is it for you to make a right choice when purchasing sheep for their wool?

	strongly agree	agree	neutral	disagree	strongly disagree
Extremely important	[ ]	[ ]	[ ]	[ ]	[ ]

9 When you make your selection of sheep for their wool, how concerned are you about the outcome of your choice?

	strongly agree	agree	neutral	disagree	strongly disagree
Very much concerned	[ ]	[ ]	[ ]	[ ]	[ ]

10 How strongly do you believe that the following groups of people have similar beliefs to you, in relation to the types and breeds of sheeps wool?

	strongly agree	agree	neutral	disagree	strongly disagree
Other farmers	[ ]	[ ]	[ ]	[ ]	[ ]
British Wool Marketing Board	[ ]	[ ]	[ ]	[ ]	[ ]
Wool brokers	[ ]	[ ]	[ ]	[ ]	[ ]
Manufacturer agents	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes manufacturers	[ ]	[ ]	[ ]	[ ]	[ ]
Clothes retailers	[ ]	[ ]	[ ]	[ ]	[ ]
Weaving mills	[ ]	[ ]	[ ]	[ ]	[ ]
Spinning mills	[ ]	[ ]	[ ]	[ ]	[ ]
People who wear wool clothing	[ ]	[ ]	[ ]	[ ]	[ ]

11 When you consider retail outlets, that sell garments made of wool, how strongly do you believe that they are:

	very important	important	neutral	unimportant	very unimportant
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

12 How strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
Customers ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Farmers are expected to have a high level of knowledge of their wool	[ ]	[ ]	[ ]	[ ]	[ ]
Wool garments by brand are not well known by customer(s)	[ ]	[ ]	[ ]	[ ]	[ ]
It is easy to form a strong relationship with my supplier	[ ]	[ ]	[ ]	[ ]	[ ]
Producing high quality wool is a good growth opportunity for me	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool characteristics	[ ]	[ ]	[ ]	[ ]	[ ]
Customers are willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
Relationships with other farmers are all important to me	[ ]	[ ]	[ ]	[ ]	[ ]
I must sell wool/wool garments that meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]
Suppliers of wool yarn/cloth/garments are expected to have high levels of technological knowledge	[ ]	[ ]	[ ]	[ ]	[ ]
People believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
It is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I have a good knowledge of wool types	[ ]	[ ]	[ ]	[ ]	[ ]
Woollen garments are nicer to wear than synthetic garments	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are not made from woollen yarn	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable clothes are made from woollen cloth	[ ]	[ ]	[ ]	[ ]	[ ]

13 If you were asked to describe the type of person who you thought would buy wool garments, would they be:

	strongly agree	agree	neutral	disagree	strongly disagree
An old person	[ ]	[ ]	[ ]	[ ]	[ ]
An outdoor person	[ ]	[ ]	[ ]	[ ]	[ ]
Fashion conscious	[ ]	[ ]	[ ]	[ ]	[ ]
Pessimistic	[ ]	[ ]	[ ]	[ ]	[ ]
Shy	[ ]	[ ]	[ ]	[ ]	[ ]

14 Which of the following statements expresses your opinion of clothing made of wool

	strongly agree	agree	neutral	disagree	strongly disagree
Unreasonably expensive	[ ]	[ ]	[ ]	[ ]	[ ]
Easy to obtain	[ ]	[ ]	[ ]	[ ]	[ ]
Long lasting	[ ]	[ ]	[ ]	[ ]	[ ]
Good value	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent quality	[ ]	[ ]	[ ]	[ ]	[ ]
Comforting	[ ]	[ ]	[ ]	[ ]	[ ]
Snugly	[ ]	[ ]	[ ]	[ ]	[ ]

15 Which of the following sentences expresses your opinion to the following statement:
When I hear the term naturally coloured wool I think of . . .

	strongly agree	agree	neutral	disagree	strongly disagree
A wonderful subtlety of colour	[ ]	[ ]	[ ]	[ ]	[ ]
A large number of colour shades	[ ]	[ ]	[ ]	[ ]	[ ]
High contrast between colours	[ ]	[ ]	[ ]	[ ]	[ ]
A limited range of basic colours	[ ]	[ ]	[ ]	[ ]	[ ]
The original colour of sheep	[ ]	[ ]	[ ]	[ ]	[ ]
A natural look about the product	[ ]	[ ]	[ ]	[ ]	[ ]
High potential of creativity	[ ]	[ ]	[ ]	[ ]	[ ]
No need to dye the wool	[ ]	[ ]	[ ]	[ ]	[ ]
Individual style for the wearer	[ ]	[ ]	[ ]	[ ]	[ ]
High rarity of product value	[ ]	[ ]	[ ]	[ ]	[ ]
A large amount of flecks of colour in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
A high level of impurities in the garment	[ ]	[ ]	[ ]	[ ]	[ ]
Consistent colour	[ ]	[ ]	[ ]	[ ]	[ ]

16 Which of the following do you believe to be a natural colour of a sheep?

beige [ ] grey [ ] white [ ] black [ ] brown [ ] green [ ] cream [ ] red [ ]

17 When you are deciding which retail outlets to shop in, how important is it to you that the shop is:

	strongly agree	agree	neutral	disagree	strongly disagree
Trendy	[ ]	[ ]	[ ]	[ ]	[ ]
Conservative	[ ]	[ ]	[ ]	[ ]	[ ]
Older generation	[ ]	[ ]	[ ]	[ ]	[ ]
Fashionable	[ ]	[ ]	[ ]	[ ]	[ ]
Classic	[ ]	[ ]	[ ]	[ ]	[ ]
Cool	[ ]	[ ]	[ ]	[ ]	[ ]

Continued . . .

18 When you are purchasing wool garments for yourself, how strongly do you agree with the following statements?

	strongly agree	agree	neutral	disagree	strongly disagree
I ask for wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool garments are soft to touch and wear	[ ]	[ ]	[ ]	[ ]	[ ]
I do not know any wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I am willing to pay more for wool/wool garments by brand	[ ]	[ ]	[ ]	[ ]	[ ]
I think it is trendy to wear wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I will not pay more for branded wool garments	[ ]	[ ]	[ ]	[ ]	[ ]
I believe that wool/wool garments must meet British Standards	[ ]	[ ]	[ ]	[ ]	[ ]

19 Briefly describe your belief of the characteristics of garments made from the following wools:

Black Welsh Mountain _____

Herdwick _____

Jacob _____

Lincoln Longwool _____

Merino _____

Pure New Wool _____

Shetland _____

Wensleydale _____

20 Have you seen a garment made from:

	yes	no
Black Welsh Mountain	[ ]	[ ]
Herdwick	[ ]	[ ]
Jacob	[ ]	[ ]
Lincoln Longwool	[ ]	[ ]
Merino	[ ]	[ ]
Pure New Wool	[ ]	[ ]
Shetland	[ ]	[ ]
Wensleydale	[ ]	[ ]

If YES for any of them, what did you think of the garment? _____

Thank you for completing the questionnaire

Please return in the SAE enclosed

B3: Sample Respondents Representativeness

Gender

The interviewers were asked to select the respondents also on a gender ratio of 2:1.

The actual respondents questioned compared to census data can be seen in Tables 1 to 6.

TABLE 1: COMPARISON OF SAMPLE SIZE AND CENSUS FIGURES
Source: Annual Abstracts of Statistics 1998

		Total		Census Estimates 1996 ('000's)	
		Number	%	Number	%
Age	11-20	87	20.2%	7227	12.3
	21-30	102	23.7%	8361	14.2
	31-40	157	36.6%	23509	39.9
	Over 61	41	9.5%	7820	13.3
Total		430	100.0	58782	46917

TABLE 2: COMPARISON OF SAMPLE SIZE AND CENSUS FIGURES
Source: Annual Abstracts of Statistics 1998

		MALE		Census Estimates 1996 ('000's)	
		Number	%	Number	%
Age	11-20	28	18.8%	3712	12.8%
	21-30	31	20.8%	4278	14.8%
	31-60	72	48.4%	11802	40.9%
	Over 61	18	12.1%	3660	12.6%
Total		149	100%	28 844	81.1%*

TABLE 3: **COMPARISON OF SAMPLE SIZE AND CENSUS FIGURES**
Source: Annual Abstracts of Statistics 1998

		FEMALE		Census Estimates 1996 ('000's)	
		Number	%	Number	%
Age	11-20	59	21.0%	3514	11.7
	21-30	71	25.3%	4082	13.6
	31-60	100	35.6%	11708	39.1
	Over 61	23	8.2%	4153	13.8
Total		281	100%	29938	

Although this application of the quota sample resulted in the results being biased towards 20 – 30 years olds, the population statistics above show that in fact the 21 – 30 age group is slightly under represented. All the other groups are reasonably representative.

However, Table 4 shows the Percentage of clothing purchased in each location. Both high street and covered malls were often frequented for all clothing purchases. From this information High Streets and Covered Malls were identified as the location for the interviews.

TABLE 4: REGULAR SHOPPERS OF SHOPPING LOCATIONS AND CLOTHING PURCHASING DECEMBER 1997

Source: BMRB/Mintel, 1998 Base 1,026 adults

	All %	Men's Clothing %	Women's Clothing %	Children's Clothing %
High Street	49	52	53	54
Local Parade	43	43	46	46
Covered Mall	24	25	29	30
City Centre	19	19	24	22
Another Town	10	10	12	13
Edge of town Retail Park	9	11	9	10
Regional Shopping Centre	4	4	4	5

TABLE 5: TOTAL SQUARE SHOPPING AREA AND ESTIMATED POTENTIAL LOCAL SHOPPERS
Source: Annual Abstracts of Statistics 1998

	Square Area Km	Population Estimate 1995 ('000's)
UK Total	241 758	58 506
Metropolitan Cities Total	1535	3 458
Birmingham	265	1 017
Non Metropolitan Cities Total	2 094	4 754
Nottingham	75	284
Bristol	110	401
New Towns	5 054	2 415

C1: Wool Clothing Findings

TABLE C.1: PERCENTAGE OF WOOL CLOTHING PURCHASED

Purchase Range	Male X 100% wool	Female X 100% wool	100% Wool Garments %	Male X Wool mix	Female X Wool mix	Wool Mix Garments %
0	15.1	17.0	32.1	0.45	0.45	0.9
1 – 10%	4.4	16.5	20.9	1.1	0	1.1
11 – 20%	4.1	9.4	13.5	0.45	1.85	2.3
21 – 30%	2.5	3.9	6.4	1.1	1.0	2.1
31 – 40%	1.1	4.2	5.3	1.6	3.7	5.3
41 – 50%	2.8	7.8	10.6	2.8	8.0	10.8
51 – 60%	1.6	3.7	5.3	1.1	4.2	5.3
61 – 70%	0.9	0.7	1.6	2.5	3.7	6.2
71 – 80%	0.7	1.8	2.5	4.2	9.8	14.0
81 – 90%	0.9	0	0.9	4.4	16.0	20.4
91 – 100%	0.45	0.45	0.9	14.9	17.0	31.7
Total	34.6	65.4	100	34.6	65.4	100

TABLE C.2: PERCENTAGE OF WOOL CLOTHING PURCHASED

Purchase Range	Male X 100% wool	Female X 100% wool	Male X Wool Mix	Female X Wool mix
0	43.7	26.0	32.1	1.3
1 – 10%	12.7	25.2	20.9	3.2
11 – 20%	11.9	14.4	13.5	1.3
21 – 30%	7.2	6.0	6.4	3.2
31 – 40%	3.2	6.4	5.3	4.6
41 – 50%	8.1	11.9	10.6	8.1
51 – 60%	4.6	5.7	5.3	3.2
61 – 70%	2.6	1.1	1.6	7.2
71 – 80%	2.0	2.8	2.5	12.1
81 – 90%	2.6	0.0	0.9	12.7
91 – 100%	1.3	0.7	0.9	43.1
Total	100.0	100.0	100.0	100.0

TABLE C.3: FREQUENCIES OF WOOL MIX PURCHASE BY JOINT INCOME

	INCOME					
Wool Mix Clothing %	**< £5,000**	**£5,000 – £10,000**	**£10,001 – £20,000**	**£20,001 - £30,000**	**£30,001 - £50,000**	**> £50,000**
No Purchases	0	1	1	1	2	0
1 – 10	0	1	0	0	3	0
11 – 20	1	0	2	2	4	1
21 – 30	0	0	2	3	3	1
31 – 40	1	1	6	8	4	2
41 – 50	2	1	14	21	3	4
51 – 50	2	2	9	6	4	0
61 –70	3	2	7	9	5	1
71 – 80	3	5	7	17	17	5
81 – 90	3	6	21	28	26	4
91 – 100	14	6	29	38	42	6
Total	29	25	98	127	133	24

Retail Outlets

TABLEC.4: FREQUENCIES OF RETAIL OUTLETS FREQUENTED BY GENDER

		Gender Frequencies	
SHOP NAME		**Male**	**Female**
Marks & Spencer	1	62	165
Next	2	60	89
River Island	3	51	93
BHS	4	29	79
C & A	4	38	70
Top Shop	6	28	
Mail Order	7	26	62
John Lewis	8	29	58
Local Market	9	32	48
Principles	10	27	46

Criteria When Purchasing Wool Clothing

TABLE C.5: PURCHASERS' RATINGS OF CRITERIA IMPORTANCE WHEN PURCHASING WOOL CLOTHING

	Total PEOPLE Frequency Who Rated The Factor	1 %	2 %	3 %	4 %	5 %
Price	294	23.9	17.4	11.9	7.6	6.7
Style of Clothing	216	21.6	11.0	5.5	5.5	6.0
Easy care of garment	193	8.5	6.9	9.9	9.6	9.4
Colour of garments	182	1.8	8.7	8.9	9.6	12.6
Purpose for buying clothes	180	13.1	8.9	5.3	8.3	5.7
Store	153	0.2	6.7	11.2	9.4	7.6
How Difficult it is to wash	147	3.4	9.2	10.3	7.6	3.2
Image of you	147	5.0	6.4	6.7	7.8	7.8
What it is made off	137	1.4	3.9	7.8	9.6	8.7
Brand Name	135	14.7	7.8	3.4	1.8	3.2
Weather expected	129	3.2	4.8	7.1	8.0	6.4
Reason for buying the clothes	121	2.8	6.2	5.7	6.2	6.9
Environmentally Friendly	31	0.2	1.6	2.8	0.5	2.1
Advertising	31	0.2	0.5	2.5	1.4	2.5

C2: Supply Chain Findings

Table C.6: Reasons for Naturally Coloured Wool Farmers to keep sheep

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Missing Data	Total
Keep sheep for wool	39.3	24.1	8.9	13.4	4.5	9.8	100.0
Keep sheep for EU subsidies	0.9	8.9	22.3	23.2	32.1	12.5	100.0
Only profitable use of land	8.9	18.8	25.9	31.3	6.3	8.9	100.0
Sheep profitable livestock	9.8	35.7	23.2	17.0	5.4	8.9	100.0
Keep sheep for carcass price	7.1	20.5	19.6	28.6	14.3	9.8	100.0

Supplier Relationships

Table C.7 How Often Suppliers are Changed

	WOOL BUYERS %	WOOL PROCESSORS %	MANUFACTURERS %	RETAILERS %
Never	57.1	61.5	40.0	20.0
Every year	14.3	15.4	20.0	30.0
2 years			10.0	40.0
3 years	14.3		10.0	10.0
4 years				
5 years		7.7		
Over 5 years	14.3	7.7	20.0	
Total	100.0	100.0	100.0	100.0

Table C.8: Supplychain Parties Satisfied with their Supplier Relationship

	Wool Processor	Manufacturer	Retailer
Strongly Agree	38.5		
Agree	61.5	10.0	10.0
Neutral		20.0	10.0
Disagree		50.0	40.0
Strongly Disagree		20.0	40.0
Total	100.0	100.0	100.0

C3: Example of Factor Analysis for Measuring Instrument 1

```
GET
  FILE='C:\My Documents\phd\DETAILED ANALYSIS\FACTORS\FARMER Q13
FACTORS.sav'.
EXECUTE .
GET
  FILE='C:\My Documents\phd\farmer survey\FARMER Q13 FACTORS.sav'.
EXECUTE .
GET
  FILE='C:\My Documents\phd\farmer survey\combined farmer
data.sav'.
EXECUTE .
FACTOR
  /VARIABLES q15a q15b q15c q15d q15e q15f q15g q15h q15i q15j
q15k q15l q15m
   /MISSING LISTWISE /ANALYSIS q15a q15b q15c q15d q15e q15f q15g
q15h q15i
  q15j q15k q15l q15m
  /PRINT INITIAL KMO EXTRACTION ROTATION
  /FORMAT SORT
  /PLOT EIGEN
/CRITERIA MINEIGEN(1)  ITERATE(25)
/EXTRACTION PC
/CRITERIA ITERATE(25)
/ROTATION VARIMAX
/METHOD=CORRELATION .
```

TABLE C.9 FACTOR ANALYSIS - COMBINED SHEEP FARMER DATASET

		.784
Bartlett's Test of	Approx. Chi- df Sig.	419.27 78 .000

Communalities

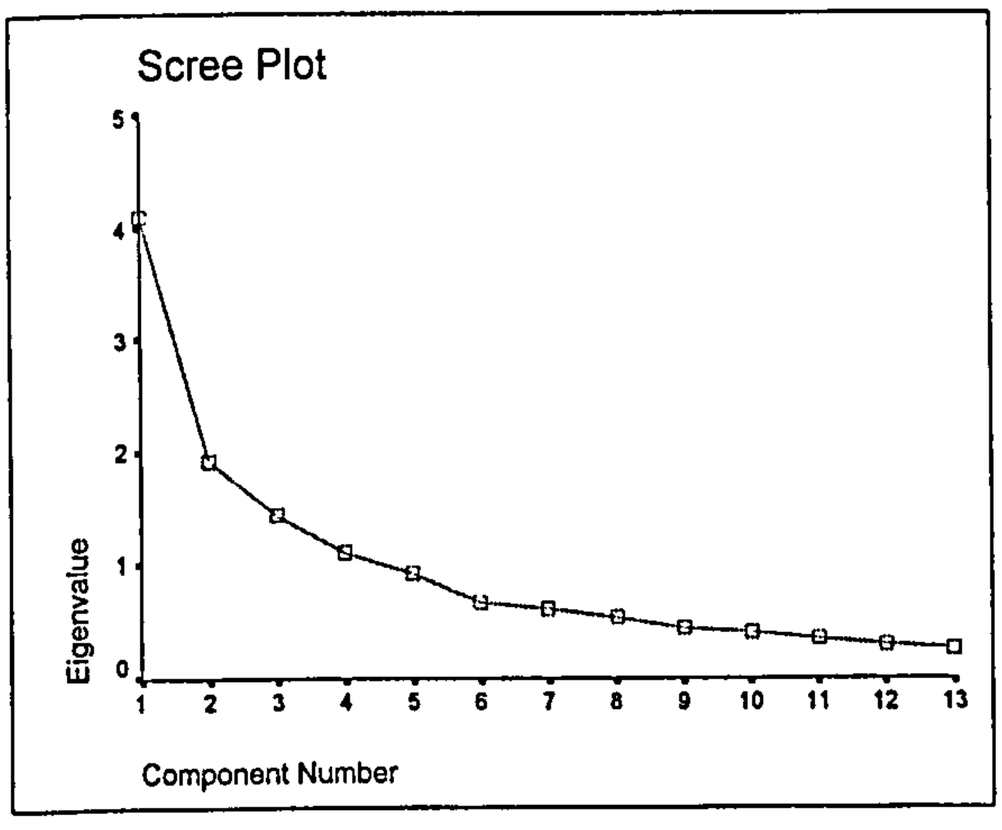
	Initial	Extraction
Subtely of colour	1.000	.599
Large no of colour shades	1.000	.642
High contrast between colours	1.000	.679
Limited range of colours	1.000	.781
Original colour of sheep	1.000	.768
Natural look	1.000	.573
High potential for creativity	1.000	.692
No need to dye the wool	1.000	.777
Individual style for the wearer	1.000	.714
High rariety of product	1.000	.748
Flecks of colour	1.000	.631
Impurities in garment	1.000	.687
Consistent colour	1.000	.256

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	4.098	31.523	31.523	4.098	31.523	31.523	3.512	27.013	27.013
2	1.905	14.653	46.177	1.905	14.653	46.177	1.737	13.362	40.375
3	1.435	11.038	57.215	1.435	11.038	57.215	1.684	12.951	53.326
4	1.109	8.530	65.745	1.109	8.530	65.745	1.614	12.419	65.745
5	.923	7.099	72.844						
6	.663	5.099	77.943						
7	.605	4.658	82.600						
8	.540	4.156	86.756						
9	.434	3.341	90.097						
10	.400	3.076	93.172						
11	.341	2.624	95.796						
12	.294	2.263	98.059						
13	.252	1.941	100.000						

Extraction Method: Principal Component Analysis.



Component Matrix[a]

	Component			
	1	2	3	4
High potential for creativity	.829	-6.76E-02	5.254E-03	-2.49E-02
High rariety of product	.810	-3.97E-02	.268	-.136
Individual style for the wearer	.801	-9.12E-02	.138	-.213
Natural look	.701	.202	.195	-5.65E-02
No need to dye the wool	.646	-.241	-2.16E-02	.549
Subtely of colour	.603	.324	-.220	-.287
Large no of colour shades	.531	.489	-.328	-.116
High contrast between colours	.179	.683	-.413	9.268E-02
Flecks of colour	4.019E-02	.632	.458	.145
Impurities in garment	-.483	.577	.134	.320
Consistent colour	-.109	.373	-.285	.154
Limited range of colours	-.120	.298	.815	-.113
Original colour of sheep	.517	-.140	7.574E-02	.689

Extraction Method: Principal Component Analysis.

a. 4 components extracted.

Rotated Component Matrix[a]

	Component			
	1	2	3	4
Individual style for the wearer	.817	-.109	.179	-4.30E-02
High rariety of product	.812	-.133	.247	9.990E-02
High potential for creativity	.749	2.221E-02	.345	-.112
Natural look	.688	.101	.219	.205
Subtely of colour	.657	.396	-7.27E-02	-7.27E-02
High contrast between colours	.118	.812	-4.51E-04	7.321E-02
Large no of colour shades	.518	.610	8.445E-03	-3.20E-02
Consistent colour	-.172	.475	-2.39E-04	2.436E-02
Original colour of sheep	.170	1.066E-02	.860	2.052E-02
No need to dye the wool	.326	-2.06E-02	.806	-.146
Limited range of colours	5.736E-02	-.285	-.166	.817
Flecks of colour	7.123E-02	.246	4.288E-02	.751
Impurities in garment	-.513	.374	-3.15E-02	.531

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 6 iterations.

Component Transformation Matrix

Component	1	2	3	4
1	.895	.099	.426	-.088
2	.067	.779	-.200	.591
3	.119	-.597	.053	.791
4	-.425	.165	.881	.129

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.

C4: Calculation for Mean Scale Scores for Measuring Instrument 1

```
GET
  FILE='C:\My Documents\phd\farmer survey\consumer data.sav'.
EXECUTE .
COMPUTE fnat = (stat5 + stat8)/2 .
EXECUTE .
COMPUTE find = (stat9 + stat10 + stat7 + stat6 +stat1)/5 .
EXECUTE .
COMPUTE fconcol = (stat2 + stat3)/2 .
EXECUTE .
COMPUTE fimp = (stat4 + stat11 + stat12)/3 .
EXECUTE .
  VARIABLES=fnat find fconcol fimp
/STATISTICS=MEAN .
```

Statistics

	N		
	Valid	Missing	Mean
Naturalness	105	7	1.8048
Individuality	101	11	1.7663
Contrasting Colours	102	10	2.4559
Impurities	99	13	3.5051

```
COMPUTE cnat = (stat6 + stat5 + stat8 + stat4)/4 .
EXECUTE .
COMPUTE cind = (stat9 + stat10 + stat7)/3 .
EXECUTE .
COMPUTE cconcol = (stat1 + stat2 + stat3)/3 .
EXECUTE .
COMPUTE cimp = (stat11 + stat12)/2 .
EXECUTE .
FREQUENCIES
  VARIABLES=cnat cind cconcol cimp
  /STATISTICS=MEAN .
```

Consumer Mean Scale Scores on the Farmer Dataset for Measuring Instrument 1

Statistics

	N		
	Valid	Missing	Mean
Naturalness	101	11	2.1436
Individuality	102	10	1.8366
Contrasting Colours	102	10	2.1863
Impurities	101	11	3.6436

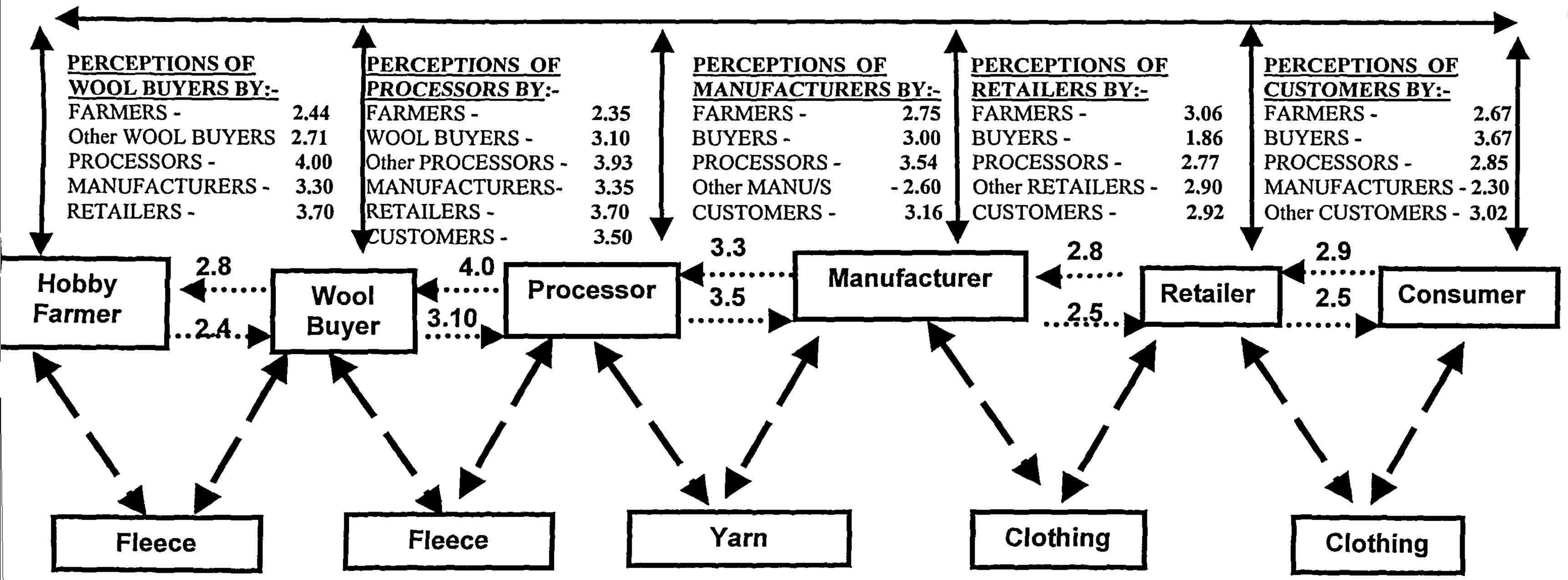
C:5

MEAN SCORE CALCULATIONS FOR THE HEXAGON GRAPHS

Hexagon Number		Supply Chain Image	Product Image	Purchase Decision Involvement	Naturally Coloured Wool Image
1	FARMER	2.44	2.35	2.15	
	WOOL BUYER	2.83	2.20	2.21	
	JOINT	2.64			2.62
2	WOOL BUYER	3.09	2.20	2.21	
	WOOL PROCESSOR	4.00	2.24	1.92	
	JOINT	3.55			2.80
3	WOOL PROCESSOR	3.93	2.24	1.92	
	MANUFACTURER	3.30	2.47	2.14	
	JOINT	3.62			2.90
4	MANUFACTURER	2.50	2.47	2.14	
	RETAILER	2.80	2.49	1.98	
	JOINT	2.65			3.00
5	RETAILER	2.92	2.48	1.98	
	CONSUMER	2.50	2.71	3.00	
	JOINT	2.71			3.01

C6: Overall System Model of Supply Chain Images

INDIRECT RELATIONSHIPS



INDIRECT RELATIONSHIPS Images of Value Chain Parties

DIRECT RELATIONSHIPS

PYRAMID BASE Images of the product